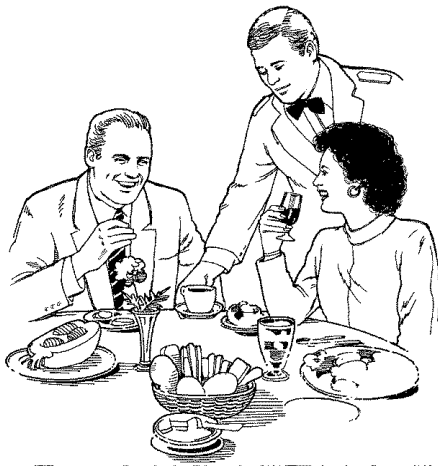


# ***RETAIL SERVICES SKILL STANDARDS***



1999

# ***ACKNOWLEDGMENTS***

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Gary Colvin, Branch Manager  
**Secondary Vocational Education  
Business & Marketing Branch**

Linda B. Dunsmore, Consultant  
**Secondary Vocational Education  
Business & Marketing Branch**

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# SECTION I



## Introduction

# INTRODUCTION



Today's students are entering an ever-changing workplace. An employee needs to be flexible, a responsible member of a team, a thinker, and a problem-solver. That same employee will likely change jobs at least five times during his/her lifetime. The job change can be made easier if the employee has a state and/or national skill standard certification.

In Redesigning and Refocusing High School Vocational Studies, the Southern Regional Education Board states that industry standards programs benefit high schools and their students in the following ways:

- ◆ The curriculum reflects instructional standards and technical learning that are compatible with the modern work setting.
- ◆ The vocational program receives increased support from industry and the community.
- ◆ Schools, instructors, and graduates receive recognition.
- ◆ Students—whose qualifications are documented—increase their chances of finding employment in an industry in which they have been trained.
- ◆ The program is more relevant to students' needs.
- ◆ The students have a record of achievement that can be transferred among employers.
- ◆ Administrators, teachers, and supervisors sharpen program goals and direction.

The mission of Marketing Education is to develop competent workers in and for the career majors within marketing, to assist in the improvement of marketing techniques, and to provide realistic opportunities to succeed through applied learning and advanced training.

Kentucky Marketing Education in partnership with the Coalition for A Stronger Retail Service Workforce (comprised of the Kentucky Retail Federation, The Kentucky Hotel/Motel Association, The Kentucky Grocers Association, and the Kentucky Restaurant Association) is currently developing a Kentucky Retail Skill Certification Pilot process (See Appendix C). Students successfully demonstrating competency in the National Retail Skill Standards will receive certification. The Professional Sales Associate Certificate will be awarded to students based on standards established by employers.

Developing a system of skill standards certification will provide a natural forum for cooperation between schools and employers. Skill standards should have the following characteristics:

1. They must be easily updated.
2. They must be specific enough to be a meaningful indication of the skills and abilities of workers and students, yet broad enough to allow job mobility and flexibility.
3. They must help students prepare for emerging jobs rather than declining jobs.
4. Workers, employers, and educators must be involved in developing, implementing, and administering skill standards systems.

5. They must be widely recognized and accepted by students, employers, and educational institutions.

The functions and foundations of marketing are broad-based and can cover a number of businesses/industries. Career Majors in the marketing program in which students may receive certification are General Retailing; Retail Services; and/or Hospitality, Travel Tourism and Recreation. The Marketing Career Majors and Sample Course Sequences shown on pages 4-6 of this section indicate the recommended courses a student should take in order to receive the training required for specific certification for that career major.

It is hoped that employers will recognize those students holding the certificates as potential job applicants who have demonstrated the skills necessary for entry into skilled occupations. It is intended that these certificates will provide students an advantage in entering the job market within the recognized industries, possibly starting at higher rates of pay and with greater opportunities for advancement.

Five reasons for defining and certifying workplace skills identified in the publication Youth Apprenticeship in America: Guidelines for Building an Effective System (1992) are

1. Certification makes it easier to identify good training programs and improve (or eliminate) bad ones.
2. Certification provides students with incentives to learn—such as the assurance that the program meets the expectations of employers—and offers alternative (hands-on) ways to study and learn.
3. Certification helps overcome employers' mistrust of young workers. Employers who perceive workers in their late teens and early twenties as unreliable are more likely to hire "certified" high school graduates for good jobs and salaries.
4. Certification encourages students and employers to invest in more on-the-job learning. Students are more willing to stay with a program if they can expect to be certified, and they are more apt to remain with the company at the end of their preparation.
5. Certification can benefit minority youth, who are often poorly served by schools and ordinary hiring procedures.

Announcement of Awards—Skill Standards and Certification: Impact Statement (October 1992) gives the following reasons for developing a system of voluntary, national skill standards which will allow:

- workers to safeguard their employment security through the accredited, portable skills that enable continued employment independent of economic conditions affecting any one industry.

- employers to reduce the cost of recruitment, increase the return on training investments, and improve the accountability of training providers through adoption of industry-based standards.
- trainers and educators to use skill standards and certificates to design and deliver relevant training to employers, employees, and government clients.

The importance of aligning with national skill standards is to insure that the standards being utilized in Kentucky will provide students a skill certificate that is portable and recognized by employers within the state and nationally.

As students work toward the achievement of a skill standards certificate, they may also earn career major certificates which are based on the following criteria:

- minimum high school graduation requirements
- four career-related credits within a career major
- 200 hours of work-based learning related to the career major
- a career-related culminating project.

The career-related culminating project must include a writing entry indicating the relationship between the project and the student's future educational plans and career aspirations, reasons for selecting the project, the process for completing the project, and a demonstration of the project.



# BUSINESS AND MARKETING CAREER CLUSTER

## MARKETING CAREER MAJORS

Advertising Services	Apparel & Access/ Fashion Merchandising	Management/ Entrepreneurship	Financial Services	Food Market Retailing
Business & Marketing Career Exploration (7 <sup>th</sup> - 8 <sup>th</sup> Grades) Exploratory Computers (7 <sup>th</sup> Grade)                      Keyboarding Applications (8 <sup>th</sup> Grade)				
GRADES 10 - 12				
Recommended Courses	Recommended Courses	Recommended Courses	Recommended Courses	Recommended Courses
Principles of Marketing Adver./Promotion I → Adver./Promotion II Salesmanship Advertising Services → Advanced Marketing Business Economics Retail Services I → Retail Services II	Principles of Marketing OR Retail Marketing Fashion Marketing I → Fashion Marketing II Business Economics → Advanced Marketing	Principles of Marketing OR Retail Marketing Entrepreneurship Business Economics → Marketing Mgmt.	Principles of Marketing OR Retail Marketing Financial Services I → Financial Services II Business Economics → Advanced Finance & Credit	Principles of Marketing OR Retail Marketing Retail Services I → Retail Services II Business Economics Market Research & Statistics → Advanced Marketing
Elective Courses	Elective Courses	Elective Courses	Elective Courses	Elective Courses
Marketing Dynamics → Marketing Mgmt. **Computer Apps. Entrepreneurship **Word Processing Retail Marketing Retail Services I → Retail Services II Marketing Comm. Market Res. & Stats.	Adver./Promotion I Marketing Dynamics → Marketing Mgmt. *Apparel Management **Computer Apps. Entrepreneurship **Word Processing Salesmanship Retail Services I → Retail Services II Marketing Comm. Market Res. & Stats. *Textile Services Other Voc. Courses	Marketing Dynamics → Advanced Marketing Adver./Promotion I *Agriscience *Clothing Management **Computer Apps. Entrepreneurship *Agribusiness/Farm Management **Word Processing Retail Services I → Retail Services II Marketing Comm. Market Res. & Stats. Other Voc. Courses	*Accounting I → Advanced Marketing Adver./Promotion I → Adver./Promotion II Marketing Dynamics → Marketing Mgmt. *Mathematics for Business & Industry **Computer Apps. Entrepreneurship **Word Processing Retail Marketing Marketing Communications Market Res. & Stats. Other Voc. Courses	Marketing Dynamics → Marketing Mgmt. **Computer Apps. Entrepreneurship *Nutritional Science **Word Processing *Culinary Skills Marketing Comm. Other Voc. Courses
*Other vocational courses directly related to career major.				
**Statewide articulation agreements exist for these courses. These agreements provide students with an opportunity to proceed in the identified computer-related areas in a non-duplicative manner from the secondary level to post-secondary technical and higher education.				
→ To complete a career major, students must earn four career-related credits within the major <u>and</u> 3 math, 2 science, 4 English, and 2 social studies credits. Three credits must come from recommended courses <u>and</u> include an upper-level course (courses indicated with an arrow.)				
NOTE: Business Economics is an interdisciplinary course which meets the graduation requirement for Economics.				

# BUSINESS AND MARKETING CAREER CLUSTER

## MARKETING CAREER MAJORS

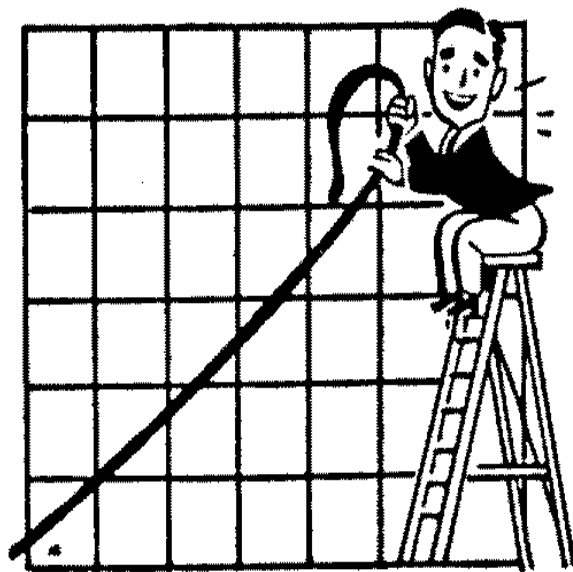
General Marketing	General Retailing/ Wholesaling	Hospitality, Travel Tourism & Recreation	Hotel/Motel Services	Sports Marketing
Business & Marketing Career Exploration (7 <sup>th</sup> - 8 <sup>th</sup> Grades) Exploratory Computers (7 <sup>th</sup> Grade)                      Keyboarding Applications (8 <sup>th</sup> Grade)				
Recommended Courses	Recommended Courses	Recommended Courses	Recommended Courses	Recommended Courses
Principles of Marketing Adver./Promotion I Retail Services I Marketing Dynamics → Advanced Marketing → Marketing Mgmt.	Principles of Marketing OR Retail Marketing Adver./Promotion I Salesmanship Business Economics Retail Services I → Advanced Marketing	Principles of Marketing OR Retail Marketing Intro. To Hospitality Business Economics → Advanced Marketing Business Economics Travel & Tourism Marketing	Principles of Marketing OR Retail Marketing Intro. To Hospitality Business Economics → Advanced Marketing Marketing Dynamics → Marketing Mgmt.	Principles of Marketing OR Retail Marketing Retail Marketing Sports Marketing Business Economics Marketing Dynamics → Advanced Marketing
Elective Courses	Elective Courses	Elective Courses	Elective Courses	Elective Courses
International Marketing *Computer Apps. Entrepreneurship *Word Processing Environmental Tech *Word Processing → Retail Services II Marketing Comm. Market Res. & Stats. Business Economics Other Voc. Courses	→ Adver./Promotion II → Marketing Mgmt. *Computer Apps. Entrepreneurship *Word Processing → Retail Services II Marketing Comm. Market Res. & Stats. Other Voc. Courses	→ Marketing Mgmt. *Computer Apps. Entrepreneurship *Environmental Tech. *Word Processing Retail Services I Marketing Comm. Market Res. & Stats. *Specialized Services in Hospitality Other Voc. Courses	**Computer Apps. Entrepreneurship *Housing Environments *Word Processing Retail Services I Marketing Comm. Market Res. & Stats. *Specialized Services in Hospitality Other Voc. Courses	→ Business Mgmt. *Computer Apps. Entrepreneurship *Word Processing Retail Services I Marketing Comm. Market Res. & Stats. Other Voc. Courses
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NOTE: Business Economics is an interdisciplinary course which meets the graduation requirement for Economics.				

# SAMPLE COURSE SEQUENCES

GENERAL RETAILING/WHOLESALING CAREER MAJOR			
ACADEMIC CORE			
9 <sup>TH</sup>	10 <sup>TH</sup>	11 <sup>TH</sup>	12 <sup>TH</sup>
English	English II	English III	English IV
Algebra I	Geometry	Math Elective ↔	Elective
Science	Science	Health & PE	Science
Social Studies	History & Appreciation of Visual and Performing Arts	Social Studies	Social Studies
TECHNICAL CORE			
Principles of Marketing OR Retail Marketing	Advertising Services OR Advertising/Promotion I	Marketing Dynamics OR Salesmanship	Advanced Marketing OR Marketing Management

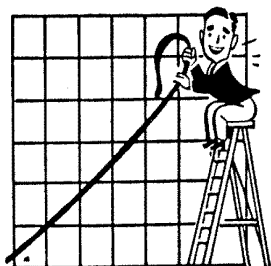
HOSPITALITY/TRAVEL TOURISM/RECREATION CAREER MAJOR			
ACADEMIC CORE			
9 <sup>TH</sup>	10 <sup>TH</sup>	11 <sup>TH</sup>	12 <sup>TH</sup>
English	English II	English III	English IV
Algebra I	Geometry	Math Elective ↔	Elective
Science	Science	Health & PE	Science
Social Studies	History & Appreciation of Visual and Performing Arts	Social Studies	Social Studies
TECHNICAL CORE			
Principles of Marketing OR Retail Marketing	Introduction to Hospitality	Travel & Tourism Marketing OR International Marketing	Marketing Management OR Advanced Marketing
	Specialized Services in Hospitality (a Family & Consumer Sciences course)	Sports and Entertainment Marketing	Entrepreneurship OR Advanced Marketing

## **SECTION II**



**What Are Skill Standards?**

# What Are Skill Standards . . .



A **skill standard** defines the level of performance necessary to be successful on the job. Components of the standards are the steps involved in completing critical tasks; tools and equipment used; description of possible problems and their responses; and the knowledge, skills, and abilities elemental to completing these tasks.

## Standards are also:

- **Performance expectations**—they take some of the mystery (and misery) out of employment decisions.
- **A re-engineering tool**—they help employers and workers gauge their own training needs.
- **Portable credentials**—they can provide assurance to employers that an individual comes equipped with certain competencies—a human seal of quality.
- **Benchmarks of excellence**—they promote consumer safety, consumer confidence, and consumer satisfaction.

## . . . and Why Do They Matter?

Labor markets are changing.

The business environment is changing.

Workers are changing jobs.

Old jobs are changing.

Training needs are changing.

Skill standards articulate changing workplace realities and help workers anticipate them. Skill standards consist of three types of information:

1. What work is being performed?
2. What are the criteria for outstanding performance?
3. What does the individual have to know, be, and do?

## Standards

- clarify what we want students to learn.
- organize curriculum.
- structure assessment.
- certify readiness for employment and further education.

# ***THE PROFESSIONAL SALES ASSOCIATE***



## **A Working Definition**

The Professional Sales Associate is able to provide product information and services that result in customer purchases, loyalty, satisfaction, and

1. Is committed to retail sales as a career, and a profession.
2. Takes personal responsibility for achieving workgroup and organizational objectives.
3. Focuses on assuring and improving customer satisfaction.
4. Takes initiative to build customer base and loyalty.
5. Has a thorough knowledge of the company's and competing product lines.
6. Understands customer needs and assists with product selection.
7. Maintains professional presentation and ethical standards.
8. Communicates effectively at all levels, both inside and outside the company.

The Professional Sales Associate supports his or her efforts by completing housekeeping, stockkeeping, and paperwork as assigned. The Professional Sales Associate also may have responsibility for such functions as cashiering, merchandise display, stock, handling complaints, and training new sales personnel.

High performance employers and employees share a commitment to and a responsibility for excellence in sales and service. Retailers are recognized for their continued strong performance in sales and profit and high levels of customer satisfaction. These retailers also empower their workers to make independent decisions by encouraging and rewarding employees who accept this challenge.

Employees in high performance retail companies:

- take responsibility for the achievement of organizational objectives;
- receive high levels of support from the retailer, in terms of training, technology, or organizational arrangement, to achieve these objectives; and
- clearly see their jobs and those of co-workers as critical to the success of the company as a whole.

# ***National Retail Skill Standards***

## **MODULE 1**

### **Provide Personalized Customer Service**

#### **TASKS KEY TO HIGH PERFORMANCE**

<b>Element</b>	<b>1.1</b>	<b>Initiate Customer Contact</b>
_____	1.1.1	Determine customer's needs by listening and asking questions
_____	1.1.2	Make shopping experience enjoyable for customer
_____	1.1.3	Give customer appropriate greeting
_____	1.1.4	Direct customer to additional services such as delivery, alterations, gift wrapping
_____	1.1.5	Refer customer to another department/store
<b>Element</b>	<b>1.2</b>	<b>Build Customer Relations</b>
_____	1.2.1	Follow through on commitments made to customers
_____	1.2.2	Respond to personal needs of customers
_____	1.2.3	Honor manufacturers' warranties
_____	1.2.4	Adhere to company's return policy
_____	1.2.5	Handle customer complaints
_____	1.2.6	Balance responsive phone service with in-store service
_____	1.2.7	Maintain key information on customers
_____	1.2.8	Conduct customer follow-up
_____	1.2.9	Provide customer with personalized business card
_____	1.2.10	Complete special orders
_____	1.2.11	Schedule personal appointment with shopper; select merchandise in advance

## **MODULE 2**

### **Sell and Promote Products**

#### **TASKS KEY TO HIGH PERFORMANCE**

<b>Element</b>	<b>2.1</b>	<b>Determine Customer Needs</b>
_____	2.1.1	Listen and ask open-ended questions
_____	2.1.2	Acquire and apply product knowledge
_____	2.1.3	Request product feedback from customer
_____	2.1.4	Handle customer objections
_____	2.1.5	Verify product is appropriate for customer use
_____	2.1.6	Offer alternative sales options
<b>Element</b>	<b>2.2</b>	<b>Build the Sale</b>
_____	2.2.1	Motivate customer to return for future purchases
_____	2.2.2	Sell customer additional or related merchandise
_____	2.2.3	Review current advertising and promotions
_____	2.2.4	Test products to be displayed
_____	2.2.5	Handle customer returns; transform into new sale
_____	2.2.6	Initiate/create special promotions
_____	2.2.7	Convert phone calls into sales
_____	2.2.8	Encourage customer to open credit accounts and purchase gift certificates
<b>Element</b>	<b>2.3</b>	<b>Close the Sale</b>
_____	2.3.1	Assist customer in making purchase decision
_____	2.3.2	Handle transactions and related paperwork
_____	2.3.3	Inform customer of return/exchange policy
_____	2.3.4	Open, maintain, and close cash register
_____	2.3.5	Package merchandise properly
_____	2.3.6	Assure that shipping/mailings/ deliveries are handled properly

# ***National Retail Skill Standards***

## **MODULE 3 Monitor Inventory**

### **TASKS KEY TO HIGH PERFORMANCE**

<b>Element</b>	<b>3.1</b>	<b>Take Inventory</b>
_____	3.1.1	Check in merchandise against paperwork
_____	3.1.2	Assure accurate pricing on merchandise
_____	3.1.3	Review stock and re-stock as appropriate
_____	3.1.4	Locate merchandise through inventory system
_____	3.1.5	Participate in periodic inventory process
<b>Element</b>	<b>3.2</b>	<b>Transfer Inventory</b>
_____	3.2.1	Prepare returned merchandise for resale
_____	3.2.2	Return inventory to manufacturer/vendor
_____	3.2.3	Initiate and/or respond to requests for merchandise transfer
_____	3.2.4	Identify damaged items and handle appropriately
_____	3.2.5	Initiate repair order
_____	3.2.6	Complete special orders

## **MODULE 4 Maintain Appearance of Department/Store**

### **TASKS KEY TO HIGH PERFORMANCE**

<b>Element</b>	<b>4.1</b>	<b>Maintain Stock, Selling, and Customer Services Area</b>
_____	4.1.1	Organize and maintain supplies
_____	4.1.2	Organize stockroom and storage areas
_____	4.1.3	Clean selling and customer services areas
_____	4.1.4	Report need for repairs or replacement
<b>Element</b>	<b>4.2</b>	<b>Maintain Product Presentation and Displays</b>
_____	4.2.1	Arrange merchandise
_____	4.2.2	Relay feedback from customers on the effectiveness of displays
_____	4.2.3	Maintain displays following company's display guidelines
_____	4.2.4	Dismantle displays



# National Retail Skill Standards

## MODULE 5 Protect Company Assets

### TASKS KEY TO HIGH PERFORMANCE

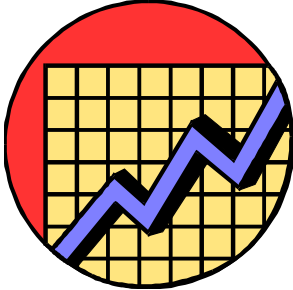
Element	5.1	Identify and Prevent Loss
_____	5.1.1	Alert customer to your presence/availability
_____	5.1.2	Attach and remove security devices
_____	5.1.3	Account for items after customer use of dressing rooms
_____	5.1.4	Report stock shrinkage
_____	5.1.5	Report security violations
_____	5.1.6	Monitor floor merchandise
_____	5.1.7	Alert sales associates to suspicious customers
Element	5.2	Follow Safety Procedures
_____	5.2.1	Report safety problems in the department/store
_____	5.2.2	Follow emergency procedures
_____	5.2.3	Maintain accurate records

## MODULE 6 Work As Part Of a Department/Store Team

### TASKS KEY TO HIGH PERFORMANCE

Element	6.1	Support Co-workers
_____	6.1.1	Share ideas and information about selling, marketing, products, customers, feedback, and loss control
_____	6.1.2	Attend store meetings and major events
_____	6.1.3	Assist/Turn over sale to co-worker to better serve customer and company
_____	6.1.4	Assist with training and orientation of new employees
_____	6.1.5	Work out schedule conflicts with co-workers
Element	6.2	Create Competitive Advantage
_____	6.2.1	Research the competition (products, prices, and services)
_____	6.2.2	Provide manager and peers with feedback on competition
_____	6.2.3	Track sales versus established standards
_____	6.2.4	Develop personal and professional goals

# ***PUTTING THE STANDARDS TO WORK***



## **Performance Indicators**

- ✓ Know and follow your own company policies and procedures.
- ✓ Find ways to demonstrate the key tasks listed based on your own retail environment. For example:
  - Large department stores may have design staff responsible for displays. In a small retail store, responsibility for all display activity may rest with the associate.
  - Stores that are part of a chain have many locations from which additional stock may be requested. Other retail stores may not.
  - Scanners and merchandise information systems are available in some environments and not others.
- ✓ Understand the retail vocabulary for your company and adapt the following as needed.
  - What do you call a merchandise inventory control number: SKU, SKN, MIN?
  - Do you use sales “associates,” representatives,” “reps,” “clerks”?

On the following pages are the six modules which comprise the National Retail Skills Standards for certification as a Professional Sales Associate.

The performance indicators for each key task appear on pages III.7 to III.24.

Students in Kentucky may receive certification by following the certification process guidelines described in Section III.

# MODULE ONE

## Provide Personalized Customer Service

1.1 Initiate Customer Contact			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>1.1.1</b>			
Determine customer's needs by listening and asking questions	To gather all the information needed to assist the customer while building rapport so the customer will return	<ul style="list-style-type: none"> <li>▶ Ask definitive questions to obtain the most specific information               <ul style="list-style-type: none"> <li>– Determine end-use/user for the product.</li> <li>– Obtain feedback on the product from the customer.</li> </ul> </li> <li>▶ Assist customer in narrowing the range of choices.               <ul style="list-style-type: none"> <li>– Determine preferred price range.</li> <li>– Determine specific vendor preference.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ Customers are motivated to return or maintain contact if associate responds to questions.</li> </ul>
<b>1.1.2</b>			
Make shopping experience enjoyable for customers	To ensure the customer's comfort through the performance of "little kindnesses"	<ul style="list-style-type: none"> <li>▶ Identify personal/individual services which could be helpful to the customer.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Appropriate services might include:               <ul style="list-style-type: none"> <li>– use of the telephone</li> <li>– a chair</li> <li>– refreshments</li> <li>– attention to accompanying children</li> <li>– customer's packages are stored safely and with proper identification</li> </ul> </li> </ul>
<b>1.1.3</b>			
Give customer an appropriate greeting	To make the customer feel welcome and encourage the development of rapport with the customer	<ul style="list-style-type: none"> <li>▶ Greet customer in a natural and timely way.</li> <li>▶ Begin conversation with appropriate remark.</li> <li>▶ Observe customer's interest and preferences for product.</li> <li>▶ Make customer aware of associate's readiness to assist.</li> <li>▶ Acknowledge accompanying adults and children as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Greeting the customer might include:               <ul style="list-style-type: none"> <li>– smiling</li> <li>– projecting a friendly and sincere demeanor</li> <li>– making eye contact</li> <li>– shaking hands</li> <li>– using open-ended questions</li> </ul> </li> </ul>
<b>1.1.4</b>			
Inform customer of additional services	To ensure that the customer is fully aware of the variety of services the store offers to meet the customer's needs	<ul style="list-style-type: none"> <li>▶ Anticipate customer's needs and provide information on other services.</li> <li>▶ Bring complimentary services to the customer's attention.</li> <li>▶ Locate additional services for the customers.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Additional services might include:               <ul style="list-style-type: none"> <li>– special events</li> <li>– alterations or installations</li> <li>– store credit card</li> <li>– mailing list</li> <li>– gift wrap</li> <li>– delivery</li> </ul> </li> <li>▶ Directions are given to departments where services can be obtained, or the customer is escorted.</li> </ul>

What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>1.1.5</b>			
Refer customer to another department or store.	To ensure that the customer's needs are satisfied when the product the customer seeks is unavailable	<ul style="list-style-type: none"> <li>▶ Associate acknowledges to customer that needs cannot be satisfied.</li> <li>▶ Refer customer to another specific department or store that can satisfy customer's needs.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Conditions for referral include the following: <ul style="list-style-type: none"> <li>– no more options at this store</li> <li>– the product is not carried by this store</li> <li>– other products or services that complement or enhance the customer's purchases that are not available at this store</li> </ul> </li> </ul>
<b>1.2 Build Customer Relations</b>			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>1.2.1</b>			
Follow through on commitments made to customers.	To assure customer that the associate and the store stand behind their promises	<ul style="list-style-type: none"> <li>▶ Clarify commitment made to customer according to store procedures.</li> <li>▶ Follow through with customers on commitments.</li> <li>▶ Enlist management and/or co-workers to assist associate in keeping commitments.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Commitments may include calling regarding special orders, checking on merchandise availability, etc.</li> </ul>
<b>1.2.2</b>			
Respond to personal needs of shoppers.	To demonstrate that associate/ store are sensitive to customer as an individual	<ul style="list-style-type: none"> <li>▶ Present alternative choices.</li> <li>▶ Record and maintain personal preferences.</li> <li>▶ Demonstrate sensitivity to specific needs or disabilities.</li> <li>▶ Provide reasonable accommodation for needs.</li> <li>▶ Demonstrate awareness of specific size needs.</li> <li>▶ Become familiar with available resources within locations (i.e., language resources).</li> </ul>	<ul style="list-style-type: none"> <li>▶ Specific personal needs may include shopping assistance for visually impaired or wheelchair bound.</li> </ul>
<b>1.2.3</b>			
Honor manufacturers' warranties.	To ensure that customers view the store as a reliable source of merchandise	<ul style="list-style-type: none"> <li>▶ Customer receives accurate information on: <ul style="list-style-type: none"> <li>– warranties on different products stocked</li> <li>– whether an item can be repaired</li> <li>– whether repair can be done in store or must be sent out</li> <li>– selecting alternate product or replacement item</li> </ul> </li> <li>▶ Associate completes and processes required documentation.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Check with the manager if it is not clear whether the problem is covered under warantee.</li> </ul>

What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>1.2.4</b>			
Adhere to company's return policy	To ensure that every customer is treated fairly and consistently	<ul style="list-style-type: none"> <li>▶ Demonstrate ability to know, comprehend, and communicate policy to customer in a systematic manner.</li> <li>▶ Inform customer of policy at point of purchase.</li> <li>▶ Apply policy as required in specific situations.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Check with the manager if the return request is unfamiliar or unusual.</li> </ul>
<b>1.2.5</b>			
Handle customer complaints	To ensure the resolution of complaints in such a way that the customer leaves the store believing he/she has been heard and the complaint has been responded to satisfactorily	<ul style="list-style-type: none"> <li>▶ Allow customer to fully explain his/her problem.</li> <li>▶ Ask customer to clarify what customer wants associate to do.</li> <li>▶ Handle complaint with as much interest as if it were a sale.</li> <li>▶ Treat customer with professionalism and respect.</li> <li>▶ Contact management when situation warrants.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Depending on store policy, appropriate occasions to contact management include: <ul style="list-style-type: none"> <li>– to resolve difficult issues</li> <li>– to communicate to the customer that the matter is important</li> <li>– when the customer is abusive</li> <li>– when customer will not be satisfied otherwise</li> </ul> </li> </ul>
<b>1.2.6</b>			
Balance responsive phone service with in-store service	To ensure that customers who call get responsive service, without sacrificing service quality to in-store customers	<ul style="list-style-type: none"> <li>▶ Excuse oneself to in-store customer to answer telephone.</li> <li>▶ Answer telephone promptly with an appropriate greeting.</li> <li>▶ Respond to customer with concise, friendly, and courteous phone service.</li> <li>▶ Furnish customer with accurate information on products and prices.</li> <li>▶ Encourage customer on phone to come into the store and request the associate by name.</li> <li>▶ Attempt to convert call to a sales opportunity, if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Proper use of the telephone as a communication device is critical to performance of the task.</li> </ul>
<b>1.2.7</b>			
Maintain key information on customers	To assist the sales associate in remembering significant facts about the customer which will allow the associate to provide more complete customer satisfaction.	<ul style="list-style-type: none"> <li>▶ Keep relevant information on each client.</li> <li>▶ Insure client information is accurate, up-to-date, and confidential.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Client information may be kept in a book, a folder, or it may be on the computer.</li> <li>▶ Information may include: <ul style="list-style-type: none"> <li>– name, address, phone numbers</li> <li>– date and type of initial contact</li> <li>– size information</li> <li>– birthdate</li> <li>– requests and desires even they were not fulfilled</li> <li>– record of purchases</li> <li>– record of correspondence</li> <li>– when the customer likes to shop</li> </ul> </li> </ul>

## RETAIL SERVICES SKILL STANDARDS - II.9

<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>1.2.8</b>			
Conduct customer follow-up	To ensure that the sale is completed to the customer's satisfaction and/or to determine whether additional purchase needs could be met	<ul style="list-style-type: none"> <li>▶ Contact customer to insure merchandise was delivered in good working condition.</li> <li>▶ Contact clients on regular basis to maintain relationship and insure satisfaction with most recent purchase.</li> <li>▶ Contact customer when there are other opportunities for purchase such as new merchandise, key events, sale events.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Key events may be a relative's birthday, Valentine's Day, new stock, sale events, fashion shows, etc.</li> <li>▶ Contact for key events can be by phone or mail.</li> </ul>
<b>1.2.9</b>			
Provide customer with personalized business card	To build customer's sense of receiving personalized service and facilitate follow-up assistance	<ul style="list-style-type: none"> <li>▶ Offer business card to the customer upon initial contact.</li> <li>▶ Attach a business card to all customer correspondence.</li> <li>▶ Print or write name of associate on the business card.</li> <li>▶ Attach a business card to the sales receipt.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Information may be provided to the customer on the receipt or a note, if business cards are not available.</li> </ul>
<b>1.2.10</b>			
Complete special orders	To ensure that customers' needs are met through special orders not available as part of the regular stock assortment.	<ul style="list-style-type: none"> <li>▶ Complete and maintain accurate special order records.</li> <li>▶ Order products from most suitable vendors.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Familiarity with what is available for special order is necessary to demonstrate this task.</li> </ul>
<b>1.2.11</b>			
Schedule personal appointment with shopper; select merchandise in advance	To provide all-inclusive personalized service to customers	<ul style="list-style-type: none"> <li>▶ Use existing customer information on file or through personal contact, to select suitable merchandise in response to customer request.</li> <li>▶ Analyze new merchandise in comparison to customer profile and initiate contact.</li> <li>▶ Schedule appointment based on customer preference and availability.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Consideration may need to be given to special hours (i.e., prior to store opening) and/or associate schedule.</li> </ul>

# MODULE TWO

## Sell and Promote Products

2.1 Determine Customer Needs			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>2.1.1</b>			
Listen and ask open-ended questions	To build rapport with the customer and to learn about the customer's needs	<ul style="list-style-type: none"> <li>▶ Ask comprehensive questions to obtain complete information.</li> <li>▶ Determine end-use/user for the product.</li> <li>▶ Obtain feedback on the product from the customer.</li> <li>▶ Assist customer in narrowing the range of choices.</li> <li>▶ Determine preferred price range.</li> <li>▶ Determine specific vendor preference.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Customers are motivated to return or maintain contact if associate responds to questions.</li> </ul>
<b>2.1.2</b>			
Acquire and apply product knowledge	To assist customer in making the best purchase decision	<ul style="list-style-type: none"> <li>▶ Explain features and benefits of different products clearly.</li> <li>▶ Tie features and benefits to the customer's needs and preferences.</li> <li>▶ Review product warranties carefully with customer.</li> <li>▶ Assist customer in weighing different factors.</li> <li>▶ Inform customer of procedures and products to care for product and prolong its life.</li> <li>▶ Use terminology which is consistent with the knowledge the customer has of the product being sold.</li> <li>▶ Locate and make use of all available sources of product knowledge.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Sources of product knowledge may include, but not be limited to:               <ul style="list-style-type: none"> <li>– package information</li> <li>– labels</li> <li>– vendor information</li> <li>– seminars/meetings</li> <li>– conversations with other associates, vendor representatives, etc.</li> </ul> </li> </ul>
<b>2.1.3</b>			
Request product feedback from customer	To determine whether product meets customer needs	<ul style="list-style-type: none"> <li>▶ Customer knows the name of the associate and regularly asks for associate by name.</li> <li>▶ Customer is asked to call the associate.</li> <li>▶ A time for contact is specified.</li> </ul>	<ul style="list-style-type: none"> <li>▶ This helps develop a relationship with customer, as well as obtain feedback on the product.</li> </ul>
<b>2.1.4</b>			
Handle customer objections	To reassure the customer that the customer's needs are being met	<ul style="list-style-type: none"> <li>▶ Restate objections and confirm for accuracy.</li> <li>▶ Emphasize benefits and value to overcome objections.</li> <li>▶ Address all customer objections.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Being able to assess if objections are personal (e.g., price) or product-related (e.g., quality) will be helpful.</li> </ul>

<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>2.1.5</b>			
Verify product is appropriate for customer	To meet customer needs	<ul style="list-style-type: none"> <li>▶ Ask specific questions regarding use of the product.</li> <li>▶ Match needs of customer with specific benefits of the product.</li> <li>▶ Adjust “sales style” to individual customer.</li> <li>▶ Demonstrate consideration when offering feedback on product.</li> <li>▶ Provide enough information for customer to make an informed decision.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Rather than sell a customer a product that is obviously inappropriate, try to help a customer select a product that suits his or her needs.</li> </ul>
<b>2.1.6</b>			
Offer alternative sales options	To meet customer needs even when the exact item sought is unavailable.	<ul style="list-style-type: none"> <li>▶ Present comparable product that meets the customer’s needs.</li> <li>▶ Use promotions to enhance the attractiveness of alternatives.</li> <li>▶ Encourage customer to consider alternatives, such as holds, transfers, layaways, etc.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Constructive and suggestive selling can help develop customer loyalty.</li> </ul>
<b>2.2 Build the Sale</b>			
<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>2.2.1</b>			
Motivate customer to return for future purchases	To create customers’ loyalty so they will return for future purchases	<ul style="list-style-type: none"> <li>▶ Maintain oral or written communication with customer.</li> <li>▶ Identify products which may help the customer in the future.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Sending thank you notes, phone calls, and special mailings are examples.</li> </ul>
<b>2.2.2</b>			
Sell customer additional or related merchandise	To enhance customer satisfaction with what has been purchased	<ul style="list-style-type: none"> <li>▶ Suggest other items in the same product line.</li> <li>▶ Suggested items are related to customer’s initial purchase.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Batteries, other sizes, and shoe polish may be examples.</li> </ul>
<b>2.2.3</b>			
Review current advertising and promotions	To be aware of information that is of interest and value to customers in order to meet their needs	<ul style="list-style-type: none"> <li>▶ Regularly communicate storewide advertising and promotions to customer.</li> <li>▶ Direct customer to advertised/featured items or promotions.</li> <li>▶ Read and understand inter-company communications.</li> <li>▶ Review flyers, catalogs, etc., to be knowledgeable about questions customers most frequently ask.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Awareness of the competition, company mission, and product trends are essential to performing this task.</li> <li>▶ Company memos on current policies, prices, seasonal contests, product and credit information, and display information may be useful.</li> </ul>



What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>2.2.4</b>			
Test products to be displayed	To ensure that all display items function properly	<ul style="list-style-type: none"> <li>▶ Test and/or inspect items prior to display.</li> <li>▶ Follow directions for product installation for use.</li> <li>▶ Report any difficulties with product use or product directions.</li> </ul>	<ul style="list-style-type: none"> <li>▶ This indicator may not apply to all sectors, i.e., apparel.</li> </ul>
<b>2.2.5</b>			
Handle customer returns; transform into new sale	To use returns to maintain customer loyalty, even in the face of an unsatisfactory purchase	<ul style="list-style-type: none"> <li>▶ Courteously determine reason for product return.</li> <li>▶ Re-confirm customer needs.</li> <li>▶ Suggest alternative items.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Behavior should not be defensive.</li> <li>▶ Associate should provide feedback to manager/buyer regarding unsatisfactory products which are returned.</li> </ul>
<b>2.2.6</b>			
Initiate/create special promotions	To attract and retain customers	<ul style="list-style-type: none"> <li>▶ Develop individual initiatives to make customer more aware of products.</li> <li>▶ Make recommendations to manager/supervisor of products needing additional push to sell.</li> <li>▶ Create internal displays/feature items.</li> <li>▶ Instruct or show potential customers how to use products.</li> <li>▶ Demonstrate ways in which product can be used.</li> <li>▶ Publicize activity to prospective customers to build traffic.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Special promotions a sales associate might suggest include such things as: <ul style="list-style-type: none"> <li>– special flyers</li> <li>– internal competitions with overstocked items</li> </ul> </li> </ul>
<b>2.2.7</b>			
Convert phone calls into sales	To bring customers into the store for current or future purchases	<ul style="list-style-type: none"> <li>▶ Complete transaction getting necessary payment information.</li> <li>▶ Qualify or ask questions to determine caller's needs.</li> <li>▶ Build sale by suggesting "add-on" items.</li> <li>▶ Answer customer's product questions.</li> <li>▶ Transfer caller to appropriate individual who can assist customer.</li> <li>▶ Suggest alternative product or alternative location.</li> <li>▶ Invite customer to make visit to the store to see product.</li> <li>▶ Suggest additional services or promote sale event or items.</li> <li>▶ Send or hold item for customer.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Customer phone calls may result from advertising or general questions and may not require demonstration of all items listed.</li> </ul>
<b>2.2.8</b>			
Encourage customers to open credit accounts and purchase gift certificates	To orient customers to the store for future purchases	<ul style="list-style-type: none"> <li>▶ Customer is asked if he/she is interested in opening a store charge account or purchasing gift certificates.</li> <li>▶ Benefits of credit account are clearly explained.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Benefits of a credit account include: <ul style="list-style-type: none"> <li>– buying power</li> <li>– ease of credit</li> <li>– notice of sales</li> <li>– coupons</li> </ul> </li> </ul>

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2.3 Close the Sale			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>2.3.1</b>			
Assist customer in making purchase decision	To serve as a resource to customers as they make a purchase decision	<ul style="list-style-type: none"> <li>▶ Tie benefits to the customer's needs and preferences.</li> <li>▶ Respond to positive buying signals of customer.</li> <li>▶ Ask customer for the sale.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Examples of positive signals of the customer might be:               <ul style="list-style-type: none"> <li>– a smile or nod.</li> <li>– asking for the fitting room.</li> </ul> </li> </ul>
<b>2.3.2</b>			
Handle transactions and related paperwork	To assure that proper company procedures for sales and related paperwork are followed	<ul style="list-style-type: none"> <li>▶ Follow company procedures accurately, completely, and in proper sequence.</li> <li>▶ Call on associates for assistance when necessary.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Associates should be familiar with most common scams.</li> <li>▶ All record keeping by hand should be legible.</li> </ul>
<b>2.3.3</b>			
Inform customer of exchange/ return policy	To assure customer of full service before and after the sale	<ul style="list-style-type: none"> <li>▶ Inform customer of policy during the course of the sale.</li> <li>▶ Remind customer to retain the sales receipt for future use.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Make sure the policy is clearly stated, and point out written policy if posted.</li> </ul>
<b>2.3.4</b>			
Open, maintain, and close cash register	To insure company's assets	<ul style="list-style-type: none"> <li>▶ Open point of sale terminal/cash register in accordance with company policy and procedure.</li> <li>▶ Close point of sale terminal/cash register according to company policy and procedure.</li> <li>▶ Report any variances on opening or closing when discovered in accordance with policy.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Opening requirements might include:               <ul style="list-style-type: none"> <li>– signing out cash</li> <li>– checking tape</li> <li>– ensuring sufficient change</li> </ul> </li> <li>▶ Accurate checks while handling cash include:               <ul style="list-style-type: none"> <li>– counting cash back to customer</li> <li>– repeating denomination to customer</li> <li>– acknowledging exchange rates</li> <li>– reviewing traveler's checks</li> </ul> </li> <li>▶ Accurate and complete handling of documentation and identification is critical to the steps.</li> </ul>
<b>2.3.5</b>			
Package merchandise appropriately	To demonstrate the value the store places on its merchandise and the customer's patronage	<ul style="list-style-type: none"> <li>▶ Carefully handle product during packaging.</li> <li>▶ Review purchases with customer during packaging, to assure accuracy.</li> <li>▶ Enclose free samples and notices with package, when available.</li> <li>▶ Offer options for transporting.</li> <li>▶ Offer assistance to those with special needs.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Options for packaging and transporting the sold items include:               <ul style="list-style-type: none"> <li>– consolidation</li> <li>– use of special boxes or packages with handles</li> <li>– shipping</li> </ul> </li> </ul>

<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>2.3.6</b>			
Assure that shipping/mailling/deliveries are handled properly	To deliver product safely at its destination	<ul style="list-style-type: none"> <li>▶ All information is written correctly and legibly.</li> <li>▶ Ask customer to verify shipping information.</li> <li>▶ Inform customer of delivery charges and taxes.</li> <li>▶ Pack merchandise in accordance with store guidelines for specific items.</li> <li>▶ Process merchandise to be sent in a timely manner.</li> <li>▶ Keep accurate shipping records.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Actual packing may not be the responsibility of the associate.</li> </ul>

# MODULE THREE

## Monitor Inventory

3.1 Take Inventory			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>3.1.1</b>			
Check in merchandise against paperwork	To ensure that merchandise is accounted for properly	<ul style="list-style-type: none"> <li>▶ Verify in a timely manner that the merchandise received is the same as shown on the purchase order.</li> <li>▶ Record discrepancies between the merchandise and the paperwork and communicate to the proper personnel.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Ability to read a purchase order is critical to performing this task.</li> <li>▶ Verifying stock is sometimes done by the stockroom.</li> </ul>
<b>3.1.2</b>			
Assure accurate pricing on merchandise	To ensure that merchandise is properly and consistently priced by attending to possible discrepancies	<ul style="list-style-type: none"> <li>▶ Promptly note discrepancies between assigned prices and recent price changes.</li> <li>▶ Follow company procedures if assigned/marked price is incorrect.</li> <li>▶ Communicate mismarks immediately and reticketed with correct item/SKU number.</li> <li>▶ Cross reference item/SKU numbers correctly.</li> <li>▶ Insure marking equipment is set with correct price information.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Numbers can be cross-referenced through               <ul style="list-style-type: none"> <li>– buying office</li> <li>– computer</li> <li>– other stores</li> </ul> </li> <li>▶ Ability to access computer based inventory system may be required to perform this task.</li> </ul>
<b>3.1.3</b>			
Review stock and restock as necessary	To maximize sales based on existing stock and customer needs	<ul style="list-style-type: none"> <li>▶ Request additional stock as required and/or requested.</li> <li>▶ Prepare out-of-stock lists as required in a timely manner.</li> <li>▶ Review basic stock listing and respond as required.</li> <li>▶ Anticipate seasonal and/or promotional stock needs to meet customer demand.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Being familiar with new items on display and quantities in stock is necessary to perform this task.</li> </ul>
<b>3.1.4</b>			
Locate merchandise through inventory system	To ensure customer satisfaction in locating desired merchandise, even if it is located in a different store	<ul style="list-style-type: none"> <li>▶ Assist customer in locating merchandise in a timely manner.</li> <li>▶ Complete documentation (if required) in an efficient manner.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Merchandise can be located through:               <ul style="list-style-type: none"> <li>– store's computerized inventory system</li> <li>– phone calls to other stores</li> </ul> </li> </ul>

What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>3.1.5</b>			
Participate in periodic inventory process	To ensure that the sales associate is familiar with and can work with the inventory system	<ul style="list-style-type: none"> <li>▶ Count merchandise on an appropriate schedule and according to company policy.</li> <li>▶ Report broken or damaged items and SKU/identification errors or omissions in a timely fashion.</li> <li>▶ Complete inventory process promptly and accurately.</li> </ul>	<ul style="list-style-type: none"> <li>▶ In some stores the entire inventory process is fully automated through the use of scanning devices.</li> </ul>
<b>3.2 Transfer Inventory</b>			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>3.2.1</b>			
Prepare returned merchandise for resale	To get the maximum sales potential from returned items	<ul style="list-style-type: none"> <li>▶ Identify items accurately if in resalable condition.</li> <li>▶ Prepare items for resale.</li> <li>▶ Reprice and reticket merchandise to be resold accurately and in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Preparation of resale may include: <ul style="list-style-type: none"> <li>– locating boxes</li> <li>– retagging</li> <li>– sending out for cleaning or repair</li> <li>– accessing store M.I.S. (Merchandise Information System)</li> </ul> </li> </ul>
<b>3.2.2</b>			
Return inventory to manufacturer/vendor	To ensure inventory return progresses promptly and smoothly	<ul style="list-style-type: none"> <li>▶ Identify merchandise to be returned completely and accurately.</li> <li>▶ Follow store procedures for returning inventory correctly.</li> </ul>	In most stores, the decision to return is made by the department manager; the responsibility of the sales associate is to complete the transaction.
<b>3.2.3</b>			
Initiate and/or respond to requests for merchandise transfer	To facilitate the transfer of merchandise between different sites to enhance customer satisfaction	<ul style="list-style-type: none"> <li>▶ Initiate transfers in a timely and accurate manner.</li> <li>▶ Follow company policy with respect to merchandise transfers.</li> <li>▶ Notify appropriate individuals in a timely manner if unable to meet transfer request or if it is questioned.</li> <li>▶ Physically prepare merchandise for transfer.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Tasks involved in initiating transfers include: <ul style="list-style-type: none"> <li>– obtain all necessary information, such as item description, size, phone number, etc.</li> <li>– check on availability at other locations</li> <li>– check with manager regarding quantity to request</li> </ul> </li> <li>▶ If item is selling well and only one in stock, it may not be sensible to send it across country.</li> </ul>
<b>3.2.4</b>			
Identify damaged items and handle appropriately	To implement company and manufacturers' policies and warranties with respect to damaged items	<ul style="list-style-type: none"> <li>▶ Take initiative to report or to fix items, if possible.</li> <li>▶ Check manufacturer's policy for options in getting item repaired or replaced.</li> <li>▶ Follow company guidelines for selling or returning or otherwise disposing of damaged items.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Damaged items may be disposed of either in the store or at a central location.</li> </ul>

What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>3.2.5</b>			
Initiate repair order	To reduce the number of damaged items in the inventory—a cost savings to the company—and maximize available inventory for the customers	<ul style="list-style-type: none"> <li>▶ Complete documentation accurately and promptly.</li> <li>▶ Transfer or arrange transfer of merchandise to repair location.</li> <li>▶ Conduct follow-up to ensure repaired goods are returned to department and appropriately repaired.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Associates may have varying responsibility for tracking repairs.</li> </ul>

# MODULE FOUR

## Maintain Appearance of Department/Store

4.1 Maintain Stock, Selling and Customer Services Area			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>4.1.1</b>			
Organize and maintain supplies	To ensure that necessary supplies are available	<ul style="list-style-type: none"> <li>▶ Maintain supplies in a safe and orderly fashion.</li> <li>▶ Anticipate supply shortages based on use patterns.</li> <li>▶ Replenish supplies as needed, following company procedures.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Supplies may be maintained and ordered through a central location.</li> </ul>
<b>4.1.2</b>			
Organize stockroom and storage areas	To maintain a well-organized stockroom which facilitates the safe and orderly functioning of the establishment	<ul style="list-style-type: none"> <li>▶ Return items to their proper places and organize stockroom on a regular basis.</li> <li>▶ Area is neat, free of trash, with nothing blocking the exit.</li> <li>▶ Organize stockroom on a regular basis.</li> <li>▶ Use appropriate safety procedures in stock and storage areas.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Associates must be familiar with stock locations.</li> <li>▶ Health, safety, and security rules should be followed in the stockroom.</li> </ul>
<b>4.1.3</b>			
Clean selling areas and customer service areas	To provide a clean and safe environment for customer and staff and to prevent loss	<ul style="list-style-type: none"> <li>▶ Dust fixtures regularly.</li> <li>▶ Use proper cleaning product and correct procedures for item being cleaned.</li> <li>▶ Dispose of trash on a regular basis and vacuum floors regularly.</li> <li>▶ Clean customer service areas as appropriate, following health and safety guidelines.</li> </ul>	<ul style="list-style-type: none"> <li>▶ In larger stores, maintenance does more and the sales associate does less.</li> </ul>
<b>4.1.4</b>			
Report need for repairs or replacement	To assure the safety and appearance of the store or department	<ul style="list-style-type: none"> <li>▶ Report worn or soiled flooring or carpeting, fixtures, or lights for cleaning or replacement in a timely manner.</li> <li>▶ Remove damaged merchandise and fixtures from floor promptly.</li> <li>▶ Items are repaired, if possible.</li> <li>▶ Maintain documentation as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Assume that a problem has not been spotted or reported by another employee.</li> </ul>

4.2 Maintain Product Presentation and Displays			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>4.2.1</b>			
Arrange merchandise	To see that the merchandise is arranged to maximize sales	<ul style="list-style-type: none"> <li>▶ Arrange merchandise for maximum visual appeal and consumer need.</li> <li>▶ Arrange merchandise to conform with presentation standards of store.</li> <li>▶ Monitor appearance of assigned area regularly.</li> <li>▶ Adjust display as appropriate according to inventory levels.</li> </ul>	<ul style="list-style-type: none"> <li>▶ The manager may arrange merchandise, with the sales associate responsible for maintaining that arrangement.</li> <li>▶ In some settings, employees expand or contract displays as necessary.</li> <li>▶ Some examples of meeting customer interests and needs are:               <ul style="list-style-type: none"> <li>– books on a single topic or by a single author are together</li> <li>– apparel is displayed with accessories</li> <li>– computer mouse pads are shown near computers</li> </ul> </li> </ul>
<b>4.2.2</b>			
Relay feedback from customers on the effectiveness of displays	To provide information on effectiveness of displays	<ul style="list-style-type: none"> <li>▶ Obtain timely and pertinent customer feedback regarding displays.</li> <li>▶ Monitor, track, and report sales levels of displayed products.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Feedback obtained by:               <ul style="list-style-type: none"> <li>– observing customer reactions</li> <li>– listening to questions and comments</li> <li>– observing if displays cause a problem with flow of traffic</li> </ul> </li> <li>▶ Criteria for evaluating displays include:               <ul style="list-style-type: none"> <li>– balanced representation by sex/race/disability</li> <li>– consistency with corporate image</li> </ul> </li> </ul>
<b>4.2.3</b>			
Maintain displays following company guidelines	To ensure that all displays conform to common guidelines	<ul style="list-style-type: none"> <li>▶ Maintain company presentation standards in displays.</li> <li>▶ Replenish items removed from display promptly.</li> <li>▶ Adjust display item, as necessary, with other or comparable items.</li> <li>▶ Maintain merchandise on the floor as always available for purchase.</li> <li>▶ Maintain clear aisles around the display.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Current knowledge of store's presentation guidelines is essential to performing this task.</li> </ul>
<b>4.2.4</b>			
Dismantle displays	To prepare for the shift to new displays	<ul style="list-style-type: none"> <li>▶ Display items are put back in their proper place promptly and prepared for resale.</li> <li>▶ Dismantling of displays is coordinated to avoid interruptions of display settings.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Some tasks that may need to be completed when preparing for resale include:               <ul style="list-style-type: none"> <li>– reticketing</li> <li>– refolding</li> <li>– placing in a box</li> </ul> </li> </ul>



# MODULE FIVE

## Protect Company Assets

5.1 Identify and Prevent Loss			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>5.1.1</b>			
Alert customer to your presence	To discourage potential shoplifters by letting them know that you are in the area	<ul style="list-style-type: none"> <li>▶ Offer assistance to all customers.</li> <li>▶ Note any suspicious activity in accordance with store guidelines.</li> <li>▶ Offer to hold or store bags and packages.</li> </ul>	▶ Examples of suspicious activity include seeing merchandise from another department, inappropriate clothing, or empty baby carriages.
<b>5.1.2</b>			
Attach and remove security devices	To protect stock from possible theft and to protect customer from leaving with device on item	<ul style="list-style-type: none"> <li>▶ Attach security devices in designated location and check to see that the device is fully locked.</li> <li>▶ Remove security devices carefully, without damaging the merchandise.</li> <li>▶ Secure the security device removal tool to assure its not being stolen.</li> </ul>	▶ Customers probably will not be able to remove these devices at home and will find it inconvenient to have to return to the store.
<b>5.1.3</b>			
Account for items after customer use of dressing rooms	To prevent theft	▶ Follow monitoring procedures for use of dressing rooms.	▶ Sales associates may monitor department by: <ul style="list-style-type: none"> <li>– making sure that there are not two items on one hanger</li> <li>– ensuring that the items that come out of the fitting room are the same that went in</li> <li>– keeping the fitting rooms clean and free of merchandise</li> </ul>
<b>5.1.4</b>			
Report stock shrinkage	To accurately reflect current inventory and minimize future loss	<ul style="list-style-type: none"> <li>▶ Report shortage quickly to appropriate individuals.</li> <li>▶ Complete necessary documentation promptly.</li> </ul>	▶ Being alert and aware of stock is critical to this task.
<b>5.1.5</b>			
Report security violations	To be able to deal with security problems efficiently and effectively	<ul style="list-style-type: none"> <li>▶ Diligently follow company check, cash, and credit card acceptance policies and report any variance.</li> <li>▶ Monitor return policies and be aware of problems.</li> <li>▶ Notify security if theft is witnessed.</li> </ul>	▶ Knowledge of various jurisdictional and company policy are essential to performing this task. Policy may vary widely among stores.

<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>5.1.6</b>			
Monitor floor merchandise	To prevent stealing of merchandise from the floor	<ul style="list-style-type: none"> <li>▶ Walk through store or department at the beginning of the shift to note stock levels.</li> <li>▶ Check store levels and positions of merchandise periodically during shift.</li> </ul>	▶ Observation of merchandise within area/department is important to this task.
<b>5.1.7</b>			
Alert sales associates to suspicious customers	To use teamwork to better protect company assets	<ul style="list-style-type: none"> <li>▶ Call other associates when a suspicious customer is noticed.</li> <li>▶ Use coded language on receipts or over the phone to alert colleagues of possible theft.</li> <li>▶ Assist new associates as a team by being aware of suspicious customers.</li> <li>▶ Notify other stores in area of suspicious individuals.</li> </ul>	▶ In some stores, it may be appropriate to notify security and not become directly involved.
<b>5.2 Follow Safety Precautions</b>			
<b>What is the key task?</b>	<b>Why is it important?</b>	<b>How might the task be demonstrated?</b>	<b>Explanatory Notes</b>
<b>5.2.1</b>			
Report safety problems in the department/store	To maintain a safe environment for both customers and staff	<ul style="list-style-type: none"> <li>▶ Report safety problems to appropriate person in a timely manner.</li> <li>▶ Repair hazard personally, if possible.</li> <li>▶ Alert customers to safety hazards and provide assurance that the problem is temporary.</li> <li>▶ Keep customer service areas and exits clear and uncluttered.</li> </ul>	▶ Each company has specific policies for safety and security and an associate must become aware of these and his/her role in each.
<b>5.2.2</b>			
Follow emergency procedures	To protect the health and safety of the customers and staff and to protect the store from legal action	<ul style="list-style-type: none"> <li>▶ Handle situations through emergency procedures and request help as needed.</li> <li>▶ Maintain calm environment.</li> <li>▶ Communicate information as it is made available.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Knowledge of company's emergency procedures is essential to performing this task.</li> <li>▶ Emergency procedures include knowing: <ul style="list-style-type: none"> <li>– where the emergency kits are</li> <li>– where the first aid kit is</li> <li>– who has the necessary skills (e.g., CPR, sign language)</li> </ul> </li> </ul>
<b>5.2.3</b>			
Maintain accurate records	To minimize liability and future problems	▶ Complete appropriate documentation promptly and forward to appropriate individuals or maintain at the location.	▶ Associates must know where and how records are maintained.

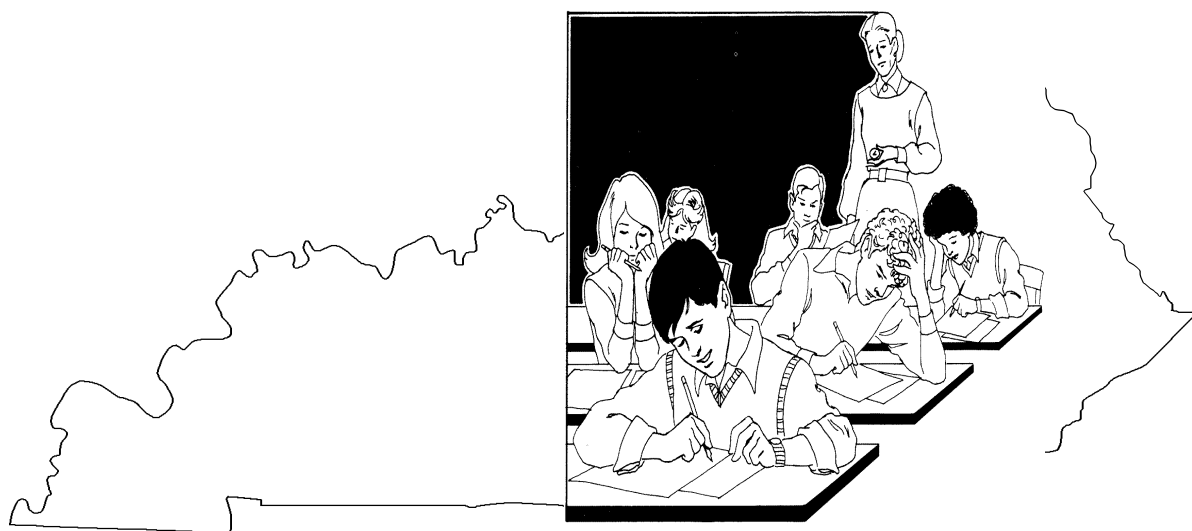
# MODULE SIX

## Work as Part of a Department/Store Team

6.1 Support Co-Workers			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory notes
<b>6.1.1</b>			
Share ideas and information about selling, marketing, and products	To document successes, to provide feedback about customers' wants and needs, and to improve responsiveness to the store's customers	<ul style="list-style-type: none"> <li>▶ Share information fully and in a timely manner.</li> <li>▶ Contribute experiences and knowledge of products with fellow associates.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Examples of information sharing are:               <ul style="list-style-type: none"> <li>– reading the company newsletter</li> <li>– sharing information from trade shows attended</li> <li>– coaching other associates by sharing successful strategies and techniques</li> <li>– suggesting changes to displays</li> <li>– informing managers about customers' wants and needs</li> <li>– informing headquarters directly on products or policies</li> </ul> </li> </ul>
<b>6.1.2</b>			
Attend store meetings and major events	To motivate the sales associate and ensure that all associates are "speaking the same language"	<ul style="list-style-type: none"> <li>▶ Attend meetings and obtain information on new policies and products.</li> <li>▶ Participate in meetings and communicate with managers.</li> <li>▶ Learn about other departments and use information to do interselling.</li> <li>▶ Receive feedback and recognition from customer comments received.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Take advantage of these meetings and events to meet and learn from other sales associates and to provide individual input.</li> </ul>
<b>6.1.3</b>			
Assist or turn over sale to co-worker	To use teamwork to better serve the customer and increase sales	<ul style="list-style-type: none"> <li>▶ Obtain assistance from other associates when another opinion will help close a sale.</li> <li>▶ Offer product information/assistance to other associates to help customer make buying decision.</li> <li>▶ Turn over customer to fellow sales associate to complete a sale, if situation requires.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Working cooperatively helps the individuals, the company, and the customer.</li> </ul>
<b>6.1.4</b>			
Assist with training and orientation of new employees	To improve training opportunities since training in a high performance work environment contributes to lower turnover	<ul style="list-style-type: none"> <li>▶ Act as "buddy" or "mentor" with new employees when asked.</li> <li>▶ Conduct or participate in training sessions as part of departmental or store meetings.</li> <li>▶ Assist new sales associates with on-the-job training.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Sales associates can strengthen their own skills by helping to train new employees.</li> </ul>

What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory notes
<b>6.1.5</b>			
Work out scheduling conflicts with co-workers	To create a collegial working environment by maintaining flexibility in working out schedules	<ul style="list-style-type: none"> <li>▶ Provide supervisor with accurate availability dates.</li> <li>▶ Maintain commitment to availability.</li> <li>▶ Cover shifts of colleagues, if possible.</li> <li>▶ Give adequate notice if filling in for co-worker is not possible.</li> <li>▶ Inform manager about switches and obtain approval.</li> <li>▶ Make request for days off well in advance.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Cooperation among associates is essential to this task.</li> </ul>
<b>6.2 Create Competitive Advantage</b>			
What is the key task?	Why is it important?	How might the task be demonstrated?	Explanatory Notes
<b>6.2.1</b>			
Research the competition (products, prices, services)	To become informed about products so that customer sees store as source of information and a resource for future sales	<ul style="list-style-type: none"> <li>▶ Explore other stores and compare prices and values.</li> <li>▶ Research products and services of other competitive stores.</li> <li>▶ Listen to and be aware of customer comments about other stores.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Product knowledge can be acquired by: <ul style="list-style-type: none"> <li>– knowing differences in technical features of store's products compared with the competition</li> <li>– developing arguments about why store's products are better or at better value, than the competition</li> </ul> </li> </ul>
<b>6.2.2</b>			
Provide manager and peers with feedback on competition	To ensure the store's competitive advantage through the cooperative efforts of all sales associates	<ul style="list-style-type: none"> <li>▶ Share information about the competition.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Information about the competition can be shared by: <ul style="list-style-type: none"> <li>– cutting out and posting competition's ads</li> <li>– writing notes to colleagues</li> </ul> </li> </ul>
<b>6.2.3</b>			
Track sales versus established standards	To document improved performance	<ul style="list-style-type: none"> <li>▶ Track sales according to company standards.</li> <li>▶ Analyses are made re: actual performance vs. goals.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Sales associates may monitor sales by: <ul style="list-style-type: none"> <li>– tracking daily volume versus a daily goal</li> <li>– tracking monthly progress</li> </ul> </li> </ul>
<b>6.2.4</b>			
Develop personal and professional goals	To contribute to the achievement of store/ department goals	<ul style="list-style-type: none"> <li>▶ Establish sales goals.</li> <li>▶ Understand and agree to goals (personal goals and or company goals).</li> </ul>	<ul style="list-style-type: none"> <li>▶ Personal goals motivate sales associates to be more productive.</li> </ul>

## SECTION III



## Kentucky's Certification Pilot Process Guidelines

# Kentucky's Retail Services Certification Guidelines



1. To be eligible to take the Retail Services Skill Standards Exam, students **MUST** submit a completed skill standards folder. (Folders will NOT be scored but will be reviewed to determine that all items are included.)
2. The skill standards folder is considered “complete” if
  - a. the student has completed 75 percent (56 standards) of the skill standards/tasks listed in the folder as verified by the teacher’s, counselor’s, and student’s signatures; and
  - 2) the student information section includes
    - work experience—school-based and/or work-based (student **MUST** have one or the other);
    - employment credentials:
      - an actual/not simulated letter of application for a retail position
      - an actual/not simulated up-to-date resume
      - and three reference letters (one each from a counselor, teacher--**OTHER** than the student’s marketing teacher, and an employer);
    - marketing courses completed and/or in which currently enrolled; student **MUST** have completed a minimum of two marketing courses **OR** must have completed one marketing course and currently be enrolled in a second marketing course.
    - **OPTIONAL:** Samples of student work.

A checklist appears at the end of this section. (Also see Appendix F–Sample Skill Standards Folder and Checklist).

3. Skill standards folders are to be submitted immediately upon arrival at State Conference prior to taking the written exam. (Coalition<sup>1</sup> representatives will review the folders.)

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<sup>1</sup>Representatives from the Kentucky Retail Federation, Kentucky Hotel/Motel Association, Kentucky Restaurant Association, and Kentucky Grocers Association who partner with Kentucky Marketing Education/DECA in the skill standards certification process.

5. Students may “sit” for the two-part written exam at the State Conference. Part one of the exam consists of 100 multiple-choice questions; part two is comprised of several written scenarios/open-response questions from which the student selects ONE to answer. Under special circumstances, arrangements may be made for school site testing AFTER State Conference. Fee for exams taken AFTER State Conference is \$15.00. Call Gary Colvin at 502-564-3775 to make arrangements. Recognition will be given at the State Conference to students who have successfully completed the process.
6. Passing score which MUST be attained on both parts of the two-part exam is 70 percent. (This score will be reviewed and revised as determined by the Coalition.)
7. Students submitting a completed skill standards folder AND receiving a score of 70 or higher on the two-part written exam will receive a Kentucky Retail Services Skill Standards Certificate (see sample certificate on the next page) and be recognized at the State Leadership Conference.

# ***Retail Services***

## ***Skill Standards Folder Checklist***

<b>Student's Checklist</b> <b>Student Name</b> _____ <b>School</b> _____	<b>Reviewer's Checklist</b>
<input type="checkbox"/> Student information section is filled in completely.  <input type="checkbox"/> An actual/ <u>not</u> simulated letter of application for a retail position  <input type="checkbox"/> An actual/ <u>not</u> simulated up-to-date resume  <input type="checkbox"/> Reference letter from a teacher (other than your marketing teacher)  <input type="checkbox"/> Reference letter from a counselor  <input type="checkbox"/> Reference letter from an employer or individual in the community  <input type="checkbox"/> Two Marketing courses are listed  <input type="checkbox"/> Work experience (either work-based or school-based-- <u>must</u> have one or the other)  <input type="checkbox"/> Skill standards attained have been checked  <input type="checkbox"/> Student has signed the folder  <input type="checkbox"/> Marketing teacher has signed the folder  <input type="checkbox"/> Counselor has signed the folder	<input type="checkbox"/> Student information section is filled in completely.  <input type="checkbox"/> An actual/ <u>not</u> simulated letter of application for a retail position  <input type="checkbox"/> An actual/ <u>not</u> simulated up-to-date resume  <input type="checkbox"/> Reference letter from a teacher (other than your marketing teacher)  <input type="checkbox"/> Reference letter from a counselor  <input type="checkbox"/> Reference letter from an employer or individual in the community  <input type="checkbox"/> Two Marketing courses are listed  <input type="checkbox"/> Work experience (either work-based or school-based-- <u>must</u> have one or the other)  <input type="checkbox"/> Skill standards attained have been checked  <input type="checkbox"/> Student has signed the folder  <input type="checkbox"/> Marketing teacher has signed the folder  <input type="checkbox"/> Counselor has signed the folder

### **SKILL STANDARDS FOLDER STATUS**

☐ Complete  
☐ Incomplete

If incomplete, what would make it complete? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Reviewer's Signature

\_\_\_\_\_

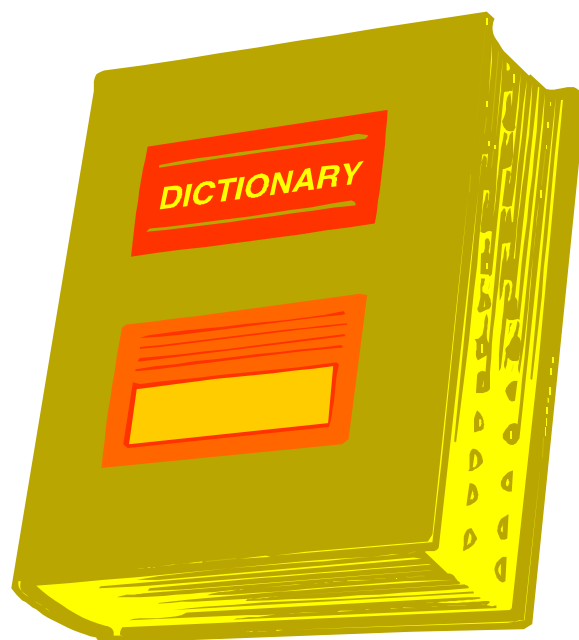
Date



## SECTION IV



## Appendices



## APPENDIX A

### Definitions



# DEFINITIONS

**Career Cluster:** A broad group of related career majors within an occupational interest area (i.e. Business and Marketing). Kentucky has 14 career clusters.

**Career Major:** A specific career goal and program of study (i.e. Retail Services) within an occupational interest area.

**Career Major Completer:** A student who completes a coherent sequence of academic and technical courses relevant to a career major, a career-related culminating project, and 200 hours of work-based learning related to a career major. SEE THE GUIDE TO SELECTING CAREER CLUSTERS AND CAREER MAJORS IN KENTUCKY for specific details.

**Career Major Certificate:** Certificate awarded to all students completing the following requirements: minimum graduation requirements; four career-related credits within a career major; 200 hours of work-based learning related to the career major; and a career-related culminating project. The career-related culminating project must include a writing entry indicating the relationship between the project and the student's future educational plans and career aspirations, reasons for selecting the project, the process for completing the project, and a demonstration of the project. This certificate is awarded by the local high school. Certificates may be ordered FREE from the Kentucky Department of Education, Secondary Vocational Education at (502) 564-3775.

**Coalition for A Stronger Retail Service Workforce:** Representatives from the Kentucky Retail Federation, Kentucky Hotel/Motel Association, Kentucky Restaurant Association, and Kentucky Grocers Association. Partners in the skill standards certification process with Kentucky Marketing Education/DECA.

**Industry Skill Standards:** Standards developed by industry which identify what students should know and be able to do. They are based on the skills needed to be prepared for entry into a specific occupational field and are identified by a representative group of employers within a given industry (i.e., ASE—Automotive Service Excellence, AWS—American Welding Society, etc.).

**Program of Study** A sequence of required courses and a range of related courses necessary for providing skills and knowledge essential to further study in a particular career or academic field.



## APPENDIX B

# Crosswalk of National Retail Skill Standards with National Marketing Competencies and Kentucky Academic Expectations



# ***CROSSWALK OF NATIONAL RETAIL SKILL STANDARDS WITH CORE COMPETENCIES AND KENTUCKY ACADEMIC EXPECTATIONS***

**NOTE:** In many cases, there is a one-to-one correspondence between competencies. In cases where the relationship is less direct, the skills standard is generally narrower in scope than the competency and would be addressed as a component of the competency. In other cases, the scope of the skills standard is broader than that of the competency; therefore, several competencies address the skills standard.

## **MODULE 1: PROVIDE PERSONALIZED CUSTOMER SERVICE**

<b>ELEMENT 1.1—INITIATE CUSTOMER CONTACT</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
1.1.1	Determine customer's needs by listening and asking questions	Address needs of individual personalities Use buying motives as basis of sales presentation	1.4	Students make sense of the various messages to which they listen.
1.1.2	Make shopping experience enjoyable for customer	Develop effective buyer-seller relationships	4.1	
1.1.3	Give customer appropriate greeting	Open the retail sale	1.12	
1.1.4	Direct customer to additional services such as delivery, alterations, gift wrapping	Direct customer/client to other locations	1.12	
1.1.5	Refer customer to another department/store	Direct customer/client to other locations	1.12	

<sup>1</sup>The Retail Skill Standards have been incorporated into and aligned with the Retail Marketing curriculum, the Principles of Marketing curriculum, and any other curriculum developed since 1997. Plans are to align all marketing courses with the Retail Skill Standards as well as with any occupational skill standards related to marketing careers (i.e., hospitality, etc.).

<b>ELEMENT 1.2–BUILD CUSTOMER RELATIONS</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
1.2.1	Follow through on commitments made to customers	Explain follow-up techniques	4.3	
1.2.2	Respond to personal needs of customers	Address needs of individual personalities	1.4	
1.2.3	Honor manufacturers' warranties	Explain warranties and guarantees	1.2	
		Process returned/damaged product	1.11	
1.2.4	Adhere to company's return policy	Interpret business policies to customers/clients	1.12	
		Explain company selling policies	1.12	
1.2.5	Handle customer complaints	Handle customer/client complaints	4.6	
1.2.6	Balance responsive phone service with in-store service	Process telephone orders	1.4	
1.2.7	Maintain key information on customers	Maintain customer cards	1.11	
1.2.8	Conduct customer follow-up	Explain follow-up techniques	1.12	
1.2.9	Provide customer with personalized business card	Develop effective buyer-seller relationships	4.1/ 4.3	
		Explain the role of customer service as a component of selling relationships	1.12	
1.2.10	Complete special orders	Process special orders	1.11	
1.2.11	Schedule personal appointment with shopper; select merchandise in advance	Coordinate selling effort with other departments–HML	4.2	

## MODULE 2: SELL AND PROMOTE PRODUCTS

<b>ELEMENT 2.1–DETERMINE CUSTOMER NEEDS</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
2.1.1	Listen and ask open-ended questions	Apply effective listening skills	1.4	
		Question for information	1.1	
2.1.2	Acquire and apply product knowledge	Acquire product information for use in selling	1.1	

	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
2.1.3	Request product feedback from customer	Acquire product information for use in selling	1.1	
2.1.4	Handle customer objections	Handle customer/client objections	4.3	
2.1.5	Verify product is appropriate for customer use	Question for information	3.4	
2.1.6	Offer alternative sales options	Suggest product substitutions	2.30	
<b>ELEMENT 2.2–BUILD THE SALE</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
2.2.1	Motivate customer to return for future purchases	Close the sale	1.12	
2.2.2	Sell customer additional or related merchandise	Demonstrate suggestion selling	1.12	
2.2.3	Review current advertising and promotions	Acquire product information for use in selling	1.2	
2.2.4	Test products to be displayed	Acquire product information for use in selling	1.3	
2.2.5	Handle customer returns; transform into new sale	Process returns	3.5	
2.2.6	Initiate/create special promotions	Design special-purpose displays	1.13	
2.2.7	Convert phone calls into sales	Process telephone orders	4.1	
		Demonstrate suggestion selling	1.12	
2.2.8	Encourage customer to open credit accounts and purchase gift certificates	Sell gift certificates	1.12	
<b>ELEMENT 2.3–CLOSE THE SALE</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
2.3.1	Assist customer in making purchase decision	Facilitate customer buying decisions	4.4	

	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
2.3.2	Handle transactions and related paperwork	Complete sales checks	1.5-1.9	
		Complete charge sale transactions	1.16	
		Operate electronic data capture machine (e.g., Zon Excel, Jr.)	1.16	
		Make change	2.11	
		Calculate tax, discounts, and miscellaneous charges for purchases	2.8	
2.3.3	Inform customer of return/exchange policy	Process returns	2.33	
2.3.4	Open, maintain, and close cash register	Operate register/P.O.S. terminal	1.16	
		Prepare cash drawers/banks	2.7	
		Maintain appropriate cash level	2.11	
		Correct register/terminal errors	2.11	
		Close out register/terminal	1.16	
2.3.5	Package merchandise appropriately	Pack and wrap products	5.1	
2.3.6	Assure that shipping/mailling/deliveries are handled properly	Arrange delivery of purchases	6.1	

### MODULE 3: MONITOR INVENTORY

<b>ELEMENT 3.1–TAKE INVENTORY</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
3.1.1	Check in merchandise against paperwork	Check incoming stock	5.1	
3.1.2	Assure accurate pricing on merchandise	Price mark stock (stamps, tags, tickets, etc.)	5.1	
3.1.3	Review stock and re-stock as appropriate	Maintain inventory levels	5.4	
3.1.4	Locate merchandise through inventory system	Access information stored in computerized information system to determine product availability and best way to service a product	1.16	



		Use an on-line inventory management system to locate and determine the availability of goods within the business	1.16	
3.1.5	Participate in periodic inventory process	Complete inventory counts	1.5-1.9	
<b>ELEMENT 3.2–TRANSFER INVENTORY</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
3.2.1	Prepare returned merchandise for resale	Process returned/damaged product	5.4	
3.2.2	Return inventory to manufacturer/ vendor	Process returns to vendors	1.11	
3.2.3	Initiate and/or respond to requests for merchandise transfer	Route stock to selling floor	5.1	
		Transfer stock (to/from branches, etc.)	1.11	
3.2.4	Identify damaged items and handle appropriately	Process returned/damaged product	5.1	
3.2.5	Initiate repair order	Process returned/damaged product	5.1	
3.2.6	Complete special orders	Transfer stock (to/from branches, etc.)	1.11	

#### MODULE 4: MAINTAIN APPEARANCE OF DEPARTMENT/STORE

<b>ELEMENT 4.1–MAINTAIN STOCK, SELLING AND CUSTOMER SERVICES AREA</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
4.1.1	Organize and maintain supplies	Manage supplies	6.2	
4.1.2	Organize stockroom and storage areas	Complete housekeeping responsibilities	6.2	
4.1.3	Clean selling and customer services areas	Complete housekeeping responsibilities	6.2	
4.1.4	Report need for repairs or replacement	Explain functions of business maintenance	5.1	
<b>ELEMENT 4.2–MAINTAIN PRODUCT PRESENTATION AND DISPLAYS</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
4.21	Arrange merchandise	Explain types of display arrangements	2.23	
		Arrange display products	2.22	
4.2.2	Relay feedback from customers on the effectiveness of displays	Explain the nature of staff communication	4.1	
		Explain the use of inter-departmental/ company communications	4.2	

4.2.3	Maintain displays following company's display guidelines	Maintain displays	6.2	
4.2.4	Dismantle displays	Dismantle displays	6.2	

## MODULE 5: PROTECT COMPANY ASSETS

ELEMENT 5.1–IDENTIFY AND PREVENT LOSS				
	Retail Skill Standards	Marketing Core Competencies		Kentucky Academic Expectations
5.1.1	Alert customer to your presence/ availability	Explain policies/procedures for handling shoplifters	1.3/ 3.5	
5.1.2	Attach and remove security devices	Explain ways small businesses can protect themselves against loss	2.18	
5.1.3	Account for items after customer use of dressing rooms	Explain ways small businesses can protect themselves against loss	2.7	
		Explain policies/procedures for handling shoplifters	2.14	
5.1.4	Report stock shrinkage	Calculate inventory shrinkage	2.8	
5.1.5	Report security violations	Explain routine security precautions	1.3/3.6	
5.1.6	Monitor floor merchandise	Explain policies/procedures for handling shoplifters	5.1	
5.1.7	Alert sales associates to suspicious customers	Explain policies/procedures for handling shoplifters	2.14	
ELEMENT 5.2–FOLLOW SAFETY PROCEDURES				
	Retail Skill Standards	Marketing Core Competencies		Kentucky Academic Expectations
5.2.1	Report safety problems in the department/store	Follow safety precautions	2.18/ 3.6	
5.2.2	Follow emergency procedures	Demonstrate emergency procedures	2.31	
5.2.3	Maintain accurate records	Follow safety precautions	1.11	

## MODULE 6: WORK AS PART OF A DEPARTMENT/STORE TEAM

<b>ELEMENT 6.1–SUPPORT CO-WORKERS</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
6.1.1	Share ideas and information about selling, marketing, products, customers, feedback and loss control	Explain the use of employee publications	1.1	
		Explain the nature of staff communications	1.2	
		Explain the use of inter-departmental/ company communications	1.11	
6.1.2	Attend store meetings and major events	Explain the nature of staff communications	1.11	
6.1.3	Assist/turn over sale to co-worker to better serve customer and company	Explain key factors in building a clientele	2.4	
6.1.4	Assist with training and orientation of new employees	Orient new employees	1.16	
6.1.5	Work out schedule conflicts with co-workers	Demonstrate problem-solving skills	2.3	
<b>ELEMENT 6.2–CREATE COMPETITIVE ADVANTAGE</b>				
	<b>Retail Skill Standards</b>	<b>Marketing Core Competencies</b>		<b>Kentucky Academic Expectations</b>
6.2.1	Research the competition (products, prices and services)	Collect information about the competition	5.3	
6.2.2	Provide manager and peers with feedback on competition	Explain the use of inter-departmental/ company communications	5.1	
6.2.3	Track sales versus established standards	Monitor sales data (by volume, product, territory, channel, time period)	1.16	
6.2.4	Attend store meetings and major events	Describe the value of sales meetings	4.2	
6.2.5	Develop personal and professional goals	Set personal goals	3.3	
		Identify tentative occupational interest	5.1	



## APPENDIX C

# KENTUCKY'S LEARNING GOALS AND ACADEMIC EXPECTATIONS

# ***Kentucky's Learning Goals and Academic Expectations***

## **GOAL 1:**

**Students are able to use basic communication and mathematics skills for purposes and situations they will encounter throughout their lives.**

- |  |   |
|--|---|
| <p>1.1 Students use reference tools such as dictionaries, almanacs, encyclopedias, and computer reference programs and research tools such as interviews and surveys to find the information they need to meet specific demands, explore interests, or solve specific problems.</p> <p>1.2 Students make sense of the variety of materials they read.</p> <p>1.3 Students make sense of the various things they observe.</p> <p>1.4 Students make sense of the various messages to which they listen.</p> <p>1.5-1.9 Students use mathematical ideas and procedures to communicate, reason, and solve problems.</p> <p>1.10 Students organize information through development and use of classification rules and systems.</p> <p>1.11 Students write using appropriate forms, conventions, and styles to communicate ideas and information to different audiences for different purposes.</p> | <p>1.12 Students speak using appropriate forms, conventions, and styles to communicate ideas and information to different audiences for different purposes.</p> <p>1.13 Students make sense of ideas and communicate ideas with the visual arts.</p> <p>1.14 Students make sense of ideas and communicate ideas with music.</p> <p>1.15 Students make sense of ideas and communicate ideas with movement.</p> <p>1.16 Students use computers and other kinds of technology to collect, organize, and communicate information and ideas.</p> |
|--|---|

## GOAL 2:

**Students shall develop their abilities to apply core concepts and principles from mathematics, the sciences, the arts, the humanities, social studies, practical living studies, and vocational studies to what they will encounter throughout their lives.**

### SCIENCE

- 2.1 Students understand scientific ways of thinking and working and use those methods to solve real-life problems.
- 2.2 Students identify, analyze, and use patterns such as cycles and trends to understand past and present events and predict possible future events.
- 2.3 Students identify and analyze systems and the ways their components work together or affect each other.
- 2.4 Students use the concept of scale and scientific models to explain the organization and functioning of living and nonliving things and predict other characteristics that might be observed.
- 2.5 Students understand that under certain conditions nature tends to remain the same or move toward a balance.
- 2.6 Students understand how living and nonliving things change over time and the factors that influence the changes.

### MATHEMATICS

- 2.7 Students understand number concepts and use numbers appropriately and accurately.
- 2.8 Students understand various mathematical procedures and use them appropriately and accurately.
- 2.9 Students understand space and dimensional concepts and use them appropriately and accurately.
- 2.10 Students understand measurement concepts and use measurements appropriately and accurately.

- 2.11 Students understand mathematical change concepts and use them appropriately and accurately.
- 2.12 Students understand mathematical structure concepts including the properties and logic of various mathematical systems.
- 2.13 Students understand and appropriately use statistics and probability.

### SOCIAL STUDIES

- 2.14 Students understand the democratic principles of justice, equality, responsibility, and freedom and apply them to real-life situations.
- 2.15 Students can accurately describe various forms of government and analyze issues that relate to the rights and responsibilities of citizens in a democracy.
- 2.16 Students observe, analyze, and interpret human behaviors, social groupings, and institutions to better understand people and the relationships among individuals and among groups.
- 2.17 Students interact effectively and work cooperatively with the many ethnic and cultural groups of our nation and world.
- 2.18 Students understand economic principles and are able to make economic decisions that have consequences in daily living.
- 2.19 Students recognize and understand the relationship between people and geography and apply their knowledge in real-life situations.
- 2.20 Students understand, analyze, and interpret historical events, conditions, trends, and issues to develop historical perspective.
- 2.21 (incorporated into 2.16.)

### ARTS AND HUMANITIES

- 2.22 Students create works of art and make presentations to convey a point of view.
- 2.23 Students analyze their own and others' artistic products and performances using accepted standards.
- 2.24 Students have knowledge of major works of art, music, and literature and appreciate creativity and the contributions of the arts and humanities.

- 2.25 In the products they make and the performances they present, students show that they understand how time, place, and society influence the arts and humanities such as languages, literature, and history.
- 2.26 Through the arts and humanities, students recognize that although people are different, they share some common experiences and attitudes.
- 2.27 Students recognize and understand the similarities and differences among languages.
- 2.28 Students understand and communicate in a second language.

### **PRACTICAL LIVING**

- 2.29 Students demonstrate skills that promote individual well-being and healthy family relationships.
- 2.30 Students evaluate consumer products and services and make effective consumer decisions.
- 2.31 Students demonstrate the knowledge and skills they need to remain physically healthy and to accept responsibility for their own physical well-being.
- 2.32 Students demonstrate strategies for becoming and remaining mentally and emotionally healthy.
- 2.33 Students demonstrate the skills to evaluate and use services and resources available in their community.
- 2.34 Students perform physical movement skills effectively in a variety of settings.
- 2.35 Students demonstrate knowledge and skills that promote physical activity and involvement in physical activity throughout their lives.

### **VOCATIONAL STUDIES**

- 2.36 Students use strategies for choosing and preparing for a career.
- 2.37 Students demonstrate skills and work habits that lead to success in future schooling and work.
- 2.38 Students demonstrate skills such as interviewing, writing resumes, and completing applications that are needed to be accepted into college or other post-secondary training or to get a job.

## **GOAL 3:**

**Students shall develop their abilities to become self-sufficient individuals.**

- 3.1 Students demonstrate positive growth in self-concept through appropriate tasks or projects.
- 3.2 Students demonstrate the ability to maintain a healthy lifestyle.
- 3.3 Students demonstrate the ability to be adaptable and flexible through appropriate tasks or projects.
- 3.4 Students demonstrate the ability to be resourceful and creative.
- 3.5 Students demonstrate self-control and self-discipline.
- 3.6 Students demonstrate the ability to make decisions based on ethical values.
- 3.7 Students demonstrate the ability to learn on one's own.

## **GOAL 4:**

**Students shall develop their abilities to become responsible members of a family, work group, or community, including demonstrating effectiveness in community service.**

- 4.1 Students effectively use interpersonal skills.
- 4.2 Students use productive team membership skills.
- 4.3 Students individually demonstrate consistent, responsive, and caring behavior.
- 4.4 Students demonstrate ability to accept the rights and responsibilities for self and others.
- 4.5 Students demonstrate an understanding of, appreciation for, and sensitivity to a multicultural and world view.
- 4.6 Students demonstrate an open mind to alternative perspectives.

## **GOAL 5:**



**Students shall develop their abilities to think and solve problems in school situations and in a variety of situations they will encounter in life.**

- 5.1 Students use critical thinking skills such as analyzing, prioritizing, categorizing, evaluating, and comparing to solve a variety of problems in real-life situations.
- 5.2 Students use creative thinking skills to develop or invent novel, constructive ideas or products.
- 5.3 Students organize information to develop or change their understanding of a concept.
- 5.4 Students use a decision-making process to make informed decisions among options.
- 5.5 Students use problem-solving processes to develop solutions to relatively complex problems.

## **GOAL 6:**

**Students shall develop their abilities to connect and integrate experiences and new knowledge from all subject matter fields with what they have previously learned and build on past learning experiences to acquire new information through various media sources.**

- 6.1 Students connect knowledge and experiences from different subject areas.
- 6.2 Students use what they already know to acquire new knowledge, develop new skills, or interpret new experiences.
- 6.3 Students expand their understanding of existing knowledge by making connections with new knowledge, skills, and experiences.



## APPENDIX D

# CROSSWALK OF NATIONAL RETAIL SKILL STANDARDS WITH EMPLOYABILITY SKILLS/SCANS

# SCANS\*

SCANS research verifies that what we call *workplace know-how* defines effective job performance today. This know-how has two elements: *competencies* and a *foundation*. The five competencies and a three-part foundation of skills and personal qualities that lie at the heart of job performance are shown in the chart below. These eight requirements are essential preparation for all students, both those going directly to work and those planning further education.

## WORKPLACE KNOW-HOW

The know-how identified by SCANS is made up of five competencies and a three-part foundation of skills and personal qualities that are needed for solid job performance. These are:

**WORKPLACE COMPETENCIES**—Effective workers can productively use:

- ▼ **Resources**—They know how to allocate time, money, materials, space, and staff.
- ▼ **Interpersonal skills**—They can work on teams, teach others, serve customers, lead, negotiate, and work well with people from culturally diverse backgrounds.
- ▼ **Information**—They can acquire and evaluate data, organize and maintain files, interpret and communicate, and use computers to process data.
- ▼ **Systems**—They understand social, organizational, and technological systems; they can monitor and correct performance; and they can design and improve systems.
- ▼ **Technology**—They can select equipment and tools, apply technology to specific tasks, and maintain and troubleshoot equipment.

**FOUNDATION SKILLS**—Competent workers in the high-performance workplace need:

- ▼ **Basic Skills**—reading, writing, arithmetic and mathematics, speaking, and listening.
- ▼ **Thinking Skills**—the ability to learn, to reason, to think creatively, to make decisions, and to solve problems.
- ▼ **Personal Qualities**—individual responsibility, self-esteem and self-management, sociability and integrity.

\*Secretary's Commission on Achieving Necessary Skills

# SCANS AND RETAIL SKILL STANDARDS

The matrix on the following pages depicts the match between the SCANS competencies and foundation skills and the National Retail Skill Standards. The codes for SCANS are as follows:

## COMPETENCIES

### Resources

- 1 Allocates Time
- 2 Allocates Money
- 3 Allocates Material and Facility Resources
- 4 Allocates Human Resources

### Information

- 5 Acquires and Evaluates Information
- 6 Organizes and Maintains Information
- 7 Interprets and Communicates Information
- 8 Uses Computers to Process Information

### Interpersonal

- 9 Participates as a Member of a Team
- 10 Teaches Others
- 11 Serves Clients/Customers
- 12 Exercises Leadership
- 13 Negotiates to Arrive at a Decision
- 14 Works with Cultural Diversity

### Systems

- 15 Understands systems
- 16 Monitors and Corrects Performance
- 17 Improves and Designs Systems

### Technology

- 18 Selects Technology

- 19 Applies Technology to Task
- 20 Maintains and Troubleshoots Technology

## FOUNDATION SKILLS

### Basic Skills

- 1 Reading
- 2 Writing
- 3 Arithmetic
- 4 Mathematics
- 5 Listening
- 6 Speaking

### Thinking Skills

- 7 Creative Thinking
- 8 Decision Making
- 9 Problem Solving
- 10 Seeing Things in the Mind's Eye
- 11 Know How to Learn
- 12 Reasoning

### Personal Qualities

- 13 Responsibility
- 14 Self-Esteem
- 15 Social
- 16 Self-Management
- 17 Integrity/Honesty

RETAIL SKILL STANDARDS	SCANS	Resources	Information	Interpersonal	Systems	Technology	Basic Skills	Thinking Skills	Personal Qualities
<b>Element 1.1–Initiate Customer Contact</b>									
1.1.1 Determine customer’s needs by listening and asking questions (SE LAP 112)		7	11	15		5, 6	7, 8, 12	15	
1.1.2 Make shopping experience enjoyable for customer		7	11	15		5, 6	7, 8, 12	15	
1.1.3 Give customer appropriate greeting		7	11	15		5, 6	7, 8, 12	15	
1.1.4 Direct customer to additional services such as delivery, alterations, gift wrapping		5, 7	11			5, 6		15	
1.1.5 Refer customer to another department/store		5, 7	11			5, 6		15	
<b>Element 1.2–Build Customer Relations</b>									
1.2.1 Follow through on commitments made to customers (SE LAP 119)		5, 8	11	15		2, 5, 6	7, 8	15	
1.2.2 Respond to personal needs of customers (SE LAP 112)		7	11	15		5, 6	7, 8, 12	15	
1.2.3 Honor manufacturers’ warranties (PP LAP 4)				15		1	12		
1.2.4 Adhere to company’s return policy		5, 7	11	15		5, 6			

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
1.2.5 Handle customer complaints (HR LAP 21)			11			5, 6		13, 15	
1.2.6 Balance responsive phone service with in-store service		5, 8	11	15		1-3, 5, 6		15	
1.2.7 Maintain key information on customers (SE LAP 116)	1	5-8	11	15, 16	19	1, 2, 5, 6	7, 8	15, 16	
1.2.8 Conduct customer follow-up (SE LAP 119)		5-8	11	15		2, 5, 6	7, 8	15	
1.2.9 Provide customer with personalized business card			11						
1.2.10 Complete special orders		5-8	11			5, 6		13	
1.2.11 Schedule personal appointment with shopper; select merchandise in advance	1, 3	5	11			5, 6	8, 10	15, 17	
<b>Element 2.1–Determine Customer Needs</b>									
2.1.1 Listen and ask open-ended questions (SE LAP 114)		5, 7	11	15		5, 6	7, 8, 12	15	
2.1.2 Acquire and apply product knowledge		5, 6		15		1, 5, 6	10	15	
2.1.3 Request product feedback from customer			11			6		13, 15	
2.1.4 Handle customer objections (SE LAP 100)		5, 7	11	15		5, 6	7, 9, 12	15	

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
2.1.5 Verify product is appropriate for customer use		5	11			5, 6	9	15, 17	
2.1.6 Offer alternative sales options		5, 7	11	15		5, 6	7, 8, 12	15	
<b>Element 2.2.–Build the Sale</b>									
2.2.1 Motivate customer to return for future purchases			11	15		5, 6	7, 8	15, 17	
2.2.2 Sell customer additional or related merchandise (SE LAP 110)		5, 7	11	15		5, 6	7	15	
2.2.3 Review current advertising and promotions		5, 6				1	10		
2.2.4 Test products to be displayed		5	11			1, 5, 6	8, 11, 12	13, 17	
2.2.5 Handle customer returns; transform into new sale		5, 8	11	15		1, 3, 5, 6	8, 9	15	
2.2.6 Initiate/Create special promotions	3	5-8	11	15			7		
2.2.7 Convert phone calls into sales		5, 8	11	15		1-3, 5, 6		15	



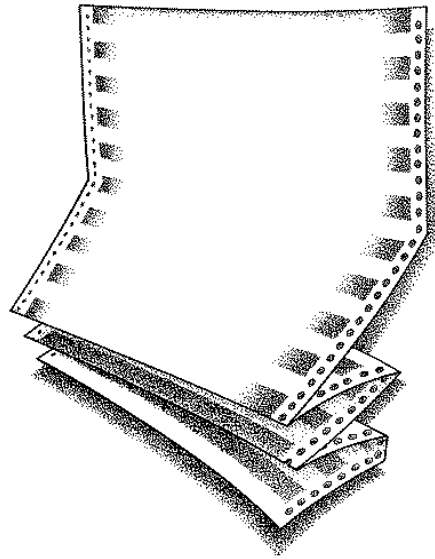
<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
2.2.8 Encourage customer to open credit accounts and purchase gift certificates		5, 7	11	15		1, 2, 5, 6		15	
<b>Element 2.3–Close the Sale</b>									
2.3.1 Assist customer in making purchase decision (SE LAP 108)		7	11	15		5, 6	7, 8, 12	15	
2.3.2 Handle transactions and related paperwork	2	5, 8	11	15		1-3, 5, 6		15, 17	
2.3.3 Inform customer of return/exchange policy		5, 7	11	15		5, 6	8	13, 15, 17	
2.3.4 Open, maintain, and close cash register	2	5, 6, 8	11	15		1-3, 5, 6	8, 9, 12	13, 15, 17	
2.3.5 Package merchandise properly (SE LAP 105)	3	5	11	15		5, 6	7-10	15	
2.3.6 Assure that shipping and mailing of deliveries are handled properly	3	5	11	15	19	1-3, 5, 6	8, 9	13, 15	
<b>Element 3.1–Take Inventory</b>									
3.1.1 Check in merchandising against paperwork	3			15	19	1, 2	12		
3.1.2 Assure accurate pricing on merchandise	3	5-8		15	19	1-3	8	13-17	

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
3.1.3 Review stock and re-stock as appropriate	3	6					10, 12		
3.1.4 Locate merchandise through inventory system		5		15		1, 2	9		
3.1.5 Participate in periodic inventory process		5, 6	9	15	19	1-3	8	17	
<b>Element 3.2–Transfer Inventory</b>									
3.2.1 Prepare returned merchandise for resale	3	5		15		1-3	8	13, 17	
3.2.2 Return inventory to manufacturer/vendor	3	5, 6		15		1-3	8, 9	17	
3.2.3 Initiate and/or respond to requests for merchandise transfer	3	5-8	9	15		1-3, 5, 6	8, 9	17	
3.2.4 Identify damaged items and handle appropriately	3	5		15		1, 2	8, 9	17	
3.2.5 Initiate repair order		5	9	15		1, 2	8	13	
3.2.6 Complete special orders		5, 7	11	15		1-3, 5, 6	9	13, 15, 17	
<b>Element 4.1–Maintain Stock, Selling, and Customer Service Area</b>									
4.1.1 Organize and maintain supplies	3	5	9	15		1, 2	8	13	

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
4.1.2 Organize stockroom and storage areas	3			15			8, 10	13	
4.1.3 Clean selling and customer service areas				15			10	13	
4.1.4 Report need for repairs or replacement				15		6	8, 9	13	
<b>Element 4.2–Maintain Product Presentation and Displays</b>									
4.2.1 Arrange merchandise	3	7		15	19		7, 10, 12		
4.2.2 Relay feedback from customers on the effectiveness of displays		5, 7	9			2, 5, 6		13	
4.2.3 Maintain displays following company's display guidelines	3	7		15			7, 8, 10, 12		
4.2.4 Dismantle displays	3	7		15	19		8, 10, 12		
<b>Element 5.1–Identify and Prevent Loss</b>									
5.1.1 Alert customer to your presence/availability		7	11			5, 6		15	
5.1.2 Attach and remove security devices	3			15	19			13	

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
5.1.3 Account for items after customer use of dressing rooms	3	5, 7		15			8, 9	13	
5.1.4 Report stock shrinkage		5, 7		15		2, 6	8	13	
5.1.5 Report security violations		5, 7	9	15		6	8	13	
5.1.6 Alert sales associates to suspicious customers		5, 7	9, 12	15		6	8, 12	13	
<b>Element 5.2–Follow Safety Procedures</b>									
5.2.1 Report safety problems in the department/store (RM LAP 2)		5		15	19	15, 16	9, 12	13	
5.2.2 Follow emergency procedures		5, 7		15	18	1, 2, 5, 6	8, 9	14	
5.2.3 Maintain accurate records		5, 6, 8		15	19	1-3	12		
<b>Element 6.1–Support Co-workers</b>									
6.1.1 Share ideas and information about selling, marketing, products, customers, feedback, and loss control		5	9						
6.1.2 Attend store meetings and major events		5							

<b>RETAIL SKILL STANDARDS</b>	<b>SCANS</b>	<b>Resources</b>	<b>Information</b>	<b>Interpersonal</b>	<b>Systems</b>	<b>Technology</b>	<b>Basic Skills</b>	<b>Thinking Skills</b>	<b>Personal Qualities</b>
6.1.3 Assist/Turn over sale to co-worker to better serve customer and company		5	9, 11						
6.1.4 Assist with training and orientation of new employees			10, 12						
6.1.5 Work out schedule conflicts with co-workers		5	9, 13						
<b>Element 6.2–Create Competitive Advantage</b>									
6.2.1 Research the competition (products, prices, and services)		5, 6							
6.2.2 Provide manager and peers with feedback on competition		7	9, 10						
6.2.3 Track sales versus established standards		5, 6							
6.2.4 Develop personal and professional goals		5, 6							



# APPENDIX E

## STUDENT RATING SHEET

# Student Rating Sheet

**Work Based** (on the job training); **business mentor** evaluation

**School Based** (classroom, DECA, school store, group/individual project, simulation, etc.); **teacher** evaluation

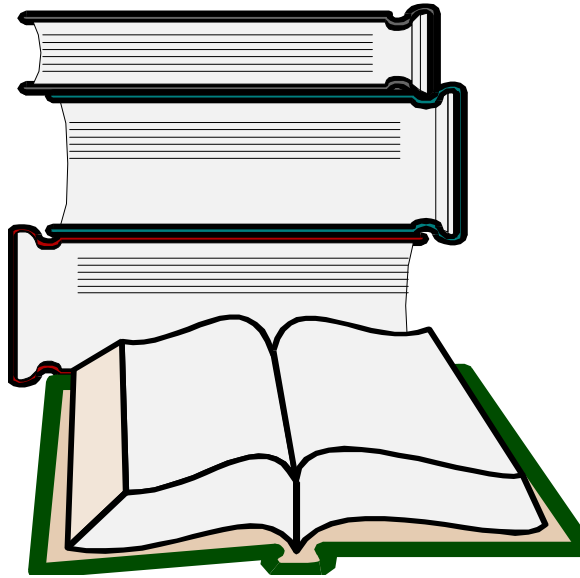
Please rate each section using: **3–Exceeds** expectations, **2–Meets** expectations, or **1–Below** expectations

SKILLS	WORK BASED	Initials of Evaluator	SCHOOL BASED	Initials of Evaluator	DATE
<b>I. Provide Personalized Customer Service</b>					
<b>1.1 Initiate Customer Contact</b>					
1.1.1 Determine customer needs by questioning					
1.1.2 Make shopping experiences enjoyable for customer					
1.1.3 Give customer appropriate greeting					
1.1.4 Direct customer to additional services					
1.1.5 Refer customer to another department/store					
<b>1.2 Build Customer Relations</b>					
1.2.1 Follow through on commitments made to customers					
1.2.2 Respond to personal needs of customers					
1.2.3 Honor manufacturer's warranties					
1.2.4 Adhere to company's return policy					
1.2.5 Handle customer complaints					
1.2.6 Balance responsive phone service with in-store service					
1.2.7 Maintain key information on customers					
1.2.8 Conduct customer follow-up					
1.2.9 Provide customer with personalized business card					
1.2.10 Complete special orders					
1.2.11 Schedule personal appointment with shopper; select merchandise in advance					
<b>II. Sell and Promote Products</b>					
<b>2.1 Determine Customer Needs</b>					
2.1.1 Listen and ask open-ended questions					
2.1.2 Acquire and apply product knowledge					
2.1.3 Use feedback from customers					
2.1.4 Handle customer objections					
2.1.5 Verify product's appropriateness for customer use					
2.1.6 Offer alternative sales options					
<b>2.2 Build the Sale</b>					
2.2.1 Motivate customers to return for future purchases					
2.2.2 Sell customer additional/related merchandise					
2.2.3 Review current advertising promotions					

SKILLS	WORK BASED	Initials of Evaluator	SCHOOL BASED	Initials of Evaluator	DATE
2.2.4 Test products to be displayed					
2.2.5 Handle customer returns					
2.2.6 Initiate/create special promotions					
2.2.7 Convert phone calls into sales					
2.2.8 Encourage customers to open credit accounts and purchase gift certificates					
<b>2.3 Close the Sale</b>					
2.3.1 Assist customer in making purchase decisions					
2.3.2 Handle transactions and related paperwork					
2.3.3 Inform customer of return/exchange policy					
2.3.4 Open, maintain, and close cash register					
2.3.5 Package merchandise properly					
2.3.6 Assure that shipping/mailling/delivery is handled properly					
<b>III. Monitor Inventory</b>					
<b>3.1 Take Inventory</b>					
3.1.1 Check in merchandise against paperwork					
3.1.2 Assure accurate pricing on merchandise					
3.1.3 Review stock and restock as appropriate					
3.1.4 Locate merchandise through inventory system					
3.1.5 Participate in periodic inventory process					
<b>3.2 Transfer Inventory</b>					
3.2.1 Prepare returned merchandise for resale					
3.2.2 Return inventory to manufacturer/vendor					
3.2.3 Initiate and/or respond to requests for merchandise transfer					
3.2.4 Identify damaged items and handle appropriately					
3.2.5 Initiate repair order					
3.2.6 Complete special orders					
<b>IV. Maintain Appearance of Department/Store</b>					
<b>4.1 Maintain Stock, Selling, and Customer Services Area</b>					
4.1.1 Organize and maintain supplies					
4.1.2 Organize stockroom and storage areas					
4.1.3 Clean and maintain selling and customer service areas					
4.1.4 Report need for repairs or replacement					
<b>4.2 Maintain Product Presentation and Displays</b>					
4.2.1 Arrange merchandise					
4.2.2 Relay feedback from customers on the effectiveness of displays					
4.2.3 Maintain displays following company's display guidelines					
4.2.4 Dismantle displays					



SKILLS	WORK BASED	Initials of Evaluator	SCHOOL BASED	Initials of Evaluator	DATE
<b>V. Protect Company Assets</b>					
<b>5.1 Identify and Prevent Loss</b>					
5.1.1 Alert customer to your availability					
5.1.2 Attach and remove security devices					
5.1.3 Account for items after customer use of dressing rooms					
5.1.4 Report stock shrinkage					
5.1.5 Report security violations					
5.1.6 Monitor floor merchandise					
5.1.7 Alert sales associates to suspicious customers					
<b>5.2 Follow Safety Procedures</b>					
5.2.1 Report safety problems in the department/store					
5.2.2 Follow emergency procedures					
5.2.3 Maintain accurate records					
<b>VI. Use Communication Skills</b>					
<b>6.1 Support Co-Workers and Function as Part of a Team</b>					
6.1.1 Effectively communicate with associates, customers, employers, and suppliers					
6.1.2 Share ideas and information about selling, marketing, and products					
6.1.3 Participate in store meetings					
6.1.4 Assist with training of new employees					
6.1.5 Work out conflicts with co-workers					
<b>6.2 Create Competitive Advantage</b>					
6.2.1 Research the competition					
6.2.2 Provide feedback on competition					
6.2.3 Track sales versus established standards					
6.2.4 Develop personal and professional goals					
<b>Additional Individualized Skills (optional):</b>					



## APPENDIX G

### Resources

# RESOURCES

## Organizations Available Materials

*American Bed and Breakfast Association*

*1407 Huguenot Road  
Midlothian, VA 23113-2644  
(804) 379-2222*

*American Collegiate Retailing Association Informational brochure*

*Pace University  
One Pace Plaza  
New York, NY 10038-1502  
(212) 346-1827*

*American Hotel & Motel Association Brochure on hotel/motel careers,*

*1201 New York Avenue, NW publications lists, and general  
Washington, DC 20005 information on the association and  
(202) 289-3100 industry*

*American Hotel & Motel Association Educational*

*Institute  
P.O. Box 1240  
East Lansing, MI 48826  
(800) 752-4567*

*American Marketing Association Informational brochure, publications*

*250 South Wacker Drive catalog, conference calendar  
Suite 200  
Chicago, IL 60606  
(312) 648-0536*

*Council on Hotel, Restaurant & Institutional*

*Education  
1200 17<sup>th</sup> St., NW*

*Washington, DC 20036  
(202) 331-5990*

*Food Industry Association Executives  
P.O. Box 219  
Las Cruces, NM 88004  
(505) 523-1992*

**Organizations Available Materials**

*Food Marketing Institute (FMI)  
800 Connecticut Avenue, NW  
Washington, DC 20006-2701  
(202) 452-8444*

*Gift Retailers, Manufacturers and Reps Association  
1100-H Brandywine Blvd.  
P.O. Box 2188  
Zanesville, OH 43702-2188  
(614) 452-4541*

**Guide to Selecting Career Clusters and  
Career Majors in Kentucky**  
*Department of Education  
Division of Secondary Vocational Education  
21<sup>st</sup> Floor Capital Plaza Tower  
500 Mero Street  
Frankfort, KY 40601  
502-564-3775  
FAX 502-564-7371*

*International Center for Companies of the Food  
Trade and Industry  
3800 Moore Place  
Alexandria, VA 22305*

(703) 549-4525

*International Mass Retail Association* Informational brochure, publications  
1901 Pennsylvania Avenue, NW, 10<sup>th</sup> Floor listing, convention program,  
Washington, DC 20006 newsletter  
(202) 861-0774

*Kentucky Grocers Association*  
Suite 205, Watterson East  
1951 Bishop Lane  
Louisville, KY 40218  
(502) 459-7111

*Kentucky Hotel/Motel Association*  
207 Shelby Street  
Frankfort, KY 40601  
(502) 875-1115

**Organizations Available Materials**

*Kentucky Restaurant Association*  
512 Executive Park  
Louisville, KY 40207  
(502) 986-0464

*Kentucky Retail Federation, Inc.*  
512 Capitol Avenue  
Frankfort, KY 40601  
(502) 875-1444

*Marketing Education Resource Center* A source for many educational  
1375 King Avenue, P.O. Box 12279 materials, videos, etc., related to the  
Columbus, OH 43212-0279 field of marketing.  
1-800-448-0398  
FAX 614-486-1819

*National Advisory Group, Convenience Stores/*

*Petroleum Marketers Association  
2063 Oak St.  
Jacksonville, FL 32204-4492  
(904) 384-1010*

*National Association of Catalog Showroom  
Merchandisers  
P.O. Box 736  
East Northport, NY 11731  
(800) 334-4711*

*National Association of Convenience Stores  
1605 King St.  
Alexandria, VA 22314-2792  
(703) 684-3600*

*National Association of Retail Dealers of America  
10 E. 22<sup>nd</sup> St.  
Lombard, IL 60148  
(708) 953-8950*

*National Federation of Independent Business  
53 Century Blvd., Suite 300  
Nashville, TN 37214  
(615) 872-5800*

**Organizations Available Materials**

*National Grocers Association  
1825 Samuel Morse Dr.  
Reston, VA 22090  
(703) 437-5300*

*National Ice Cream and Yogurt Retailers  
Association  
321 D St., NE  
Washington, DC 20002*

(202) 543-3838

*National Nutritional Foods Association*  
150 E. Paularino Ave., No. 285  
Costa Mesa, CA 92626  
(714) 966-6632

*National Restaurant Association* Catalogs of publications and  
1200 17<sup>th</sup> Street, NW resource materials  
Washington, DC 20036  
(202) 331-5900

*National Retail Federation* Informational brochure, copy of  
Liberty Place, Suite 1000 monthly NRF magazine entitled  
325 7<sup>th</sup> Street, NW Stores  
Washington, DC 20004  
(202) 783-7971  
FAX: 202-737-2849

*National Skill Standards Board*  
<http://www.nssb.org>

*Sales and Marketing Executives, International* Informational brochure, newsletter  
Statler Office Tower, Suite 977  
Cleveland, OH 44115  
(216) 771-6650

*Waiters Association*  
1100 W. Beaver  
State College, PA 16801  
(800) 437-7842